
**Economic and Fiscal Impact
of
Bank One Ballpark and Arizona Diamondbacks**

**Prepared For
Maricopa County Stadium District**

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Table of Contents

| | |
|-----------------------------------------------------|----|
| Executive of Summary | i |
| 1.0 Introduction | 1 |
| 2.0 Methodology and Sources | 2 |
| 3.0 Summary of Survey Findings | 5 |
| 4.0 Economic Impact of BOB and Arizona Diamondbacks | 8 |
| 5.0 Fiscal Impact of BOB and Arizona Diamondbacks | 16 |
| 6.0 Appendix – Summary of Surveys | 23 |

Executive Summary

Elliott D. Pollack and Company, in conjunction with the Behavior Research Center, has been retained by the Maricopa County Stadium District to undertake an economic and fiscal impact study of Bank One Ballpark (BOB) and the Arizona Diamondbacks baseball team. The analysis is based on attendance at Diamondbacks baseball games and non-baseball events held at the stadium during calendar year 2000. The study has been augmented by two research/public opinion surveys designed to identify (1) the visitation and spending patterns of both local and out-of-town Diamondbacks baseball fans and (2) the attitudes of Valley residents towards Bank One Ballpark and the Arizona Diamondbacks.

One of the major purposes for conducting the research/public opinion surveys was to estimate the net impact of the stadium and baseball team on Maricopa County. The term net impact refers to the new spending that occurs within Maricopa County as a direct result of the introduction of the stadium and baseball team to the economy. An important benefit of a Major League Baseball team is its ability to attract out-of-town visitors to the region who are willing to spend dollars in the local economy. These are new dollars that otherwise would not have been spent locally except for the presence of the baseball team. In this sense, Major League Baseball is an important “export” industry that generates additional local income and consumption. Likewise, certain non-baseball events held at the ballpark, such as motorcross competitions and football games, also attract out-of-town visitors and new spending.

Some of the primary results of the survey are the following.

- Sixteen percent (16%) of all Diamondbacks game attendee parties in 2000 were from outside Maricopa County. Of the out-of-area attendee parties, 62% were from Arizona outside of Maricopa County and 38% were from out-of-state. The typical local attendee party contained 3.1 members while the median party size for out-of-area attendees was 4.0.
- Thirty-nine percent (39%) of all out-of-area game attendees indicated that game attendance was their primary reason for visiting Metro Phoenix while 25% indicated it was a major reason.
- The median stay in Maricopa County for out-of-area attendees living in Arizona was 1.3 nights. The median stay for out-of-state attendees was 2.2 nights.
- The typical game attendee party from Arizona outside of Maricopa County spent \$131 per day on their trip to Metro Phoenix. By contrast, the typical out-of-state game attendee party spent \$269 per day.
- Valley residents hold a very positive attitude towards Bank One Ballpark and believe it has been an important addition to the Valley.
 - By better than an eight to one ratio, residents feel the Ballpark has had a positive impact on the Valley - 74% positive vs. 9% negative.

- Eighty-two percent (82%) of residents believe the Ballpark has had a positive impact on the development of downtown Phoenix.
 - Seventy-eight percent (78%) of residents believe the Ballpark has had a positive economic impact on the Valley.
 - By nearly a three to one margin, residents believe that Bank One Ballpark was a good investment of public funds - 65% think it's a good investment vs. 24% think it's a bad investment.
- Valley residents also believe that the Arizona Diamondbacks have had a positive impact on the Valley and downtown Phoenix. Following are some detailed survey results.
 - Eighty-two percent (82%) of residents believe the Arizona Diamondbacks are a benefit to the community.
 - Seventy-nine percent (79%) of residents believe that having the Arizona Diamondbacks in town has had a positive impact on the Valley's image in other areas of the U.S.
 - Seventy-nine percent (79%) of residents believe that having the Arizona Diamondbacks play in downtown Phoenix has helped revitalize the downtown area.

This report describes both the gross and net impacts of Bank One Ballpark and the Arizona Diamondbacks during calendar year 2000. Of the two types of impacts, the net effect is the most important since it represents the expenditure of new dollars within the local economy. The net impact of the team and stadium is described in the remainder of this summary. Gross impact estimates are included in the full text of this report.

The net economic impact of BOB and the Diamondbacks is comprised of four elements:

- Spending by out-of-town visitors associated with their trip to a baseball game in Maricopa County;
- Local attendee spending at baseball games that would be saved and not spent elsewhere in the local economy;
- Visiting baseball team spending;
- Net, new spending at other non-baseball Bank One Ballpark events.

The spending of out-of-town baseball fans is a primary component of the net impact of the Diamondbacks since it represents new dollars added to the Maricopa County economy. Alternatively, much of the spending by local attendees at Diamondbacks games is not considered new spending in the local economy but rather a reallocation of dollars from other entertainment or sporting events. The BOB Attendee Survey was designed to ascertain the

percentage of baseball game spending by local attendees that would be spent on other entertainment events if the Diamondbacks were not located here and the percentage of spending that would be saved and not injected into the local economy. This latter spending is considered new economic activity attributable to the Diamondbacks.

Estimates were also developed on the amount of net, new spending related to the non-baseball events held at the Bank One Ballpark. Over the past year, BOB has hosted twelve events including football, basketball and soccer games, trade shows and concerts. These events generated attendance of over 250,000 persons at the stadium with the largest event drawing nearly 43,000 attendees. In addition to the ticket and concession sales occurring directly in Bank One Ballpark, an estimated 62,000 persons spent at least one night in Metro Phoenix while attending the events. The in-stadium and out-of-stadium spending impact of these events is included in the estimates of net economic and fiscal impact.

Table A

| Bank One Ballpark 2000 Event Schedule | | |
|----------------------------------------------|----------|----------------|
| Event | Date | Attendance |
| Fiesta Bowl Band Championships | Jan. 1 | 9,200 |
| Arizona National Boat Show | Jan. 7-9 | 23,384 |
| Festival of Faith | Jan. 12 | 26,356 |
| PACE Off Road | Jan. 22 | 17,719 |
| PACE Supercross | Jan. 29 | 42,841 |
| Fry's Fiesta Phoenix | Feb. 12 | 22,712 |
| Grand Canyon State Games | Jun. 15 | 15,000 |
| New Times 10K | Nov. 12 | 24,000 |
| US Women's Soccer | Dec. 17 | 10,577 |
| Hoops for the Cure | Dec. 27 | 16,482 |
| Insight.com Bowl | Dec. 28 | 35,314 |
| Fiesta Bowl Band Championships | Dec. 29 | 10,175 |
| Total | | 253,760 |

Source: Select Artists Associates

Total net direct spending attributable to the Diamondbacks and BOB in 2000 is estimated at approximately \$56.5 million (see Table B). About 50% of that amount is the result of spending by out-of-area visitors at Diamondbacks' baseball games or on their trip to Metro Phoenix. Local game attendee spending contributed another 31% while visiting baseball teams accounted for less than \$1 million of the total. Attendance at non-baseball events totals about \$9.7 million in direct spending or 17% of the total direct impact.

Table B

| Net Economic Impact of Bank One Ballpark and Arizona Diamondbacks On Maricopa County in 2000 | | | | | |
|---------------------------------------------------------------------------------------------------------|------------------------------------------|------------------------------------|---------------------------------------|-------------------------------|----------------------|
| Type of Impact | Out-of-town game attendee spending | Local game attendee spending | Visiting baseball team spending | Other non- baseball events | Total |
| Direct spending | \$28,304,000 | \$17,558,000 | \$988,000 | \$9,662,000 | \$56,512,000 |
| Indirect/Induced spending | \$25,659,000 | \$16,411,000 | \$896,000 | \$8,824,000 | \$51,790,000 |
| Total spending | \$53,963,000 | \$33,969,000 | \$1,884,000 | \$18,485,000 | \$108,301,000 |
| Wages | \$21,300,000 | \$12,857,000 | \$743,000 | \$7,224,000 | \$42,124,000 |
| Jobs | 770 | 470 | 30 | 260 | 1,530 |

Sources: Bank One Ballpark Attendee Survey, Arizona Diamondbacks, Select Artists Associates, Elliott D. Pollack & Co.

Multipliers were applied to these figures to estimate the indirect and induced spending related to the Diamondbacks and stadium as well as employment and wages supported by attendee spending. In total, the net impact of the Diamondbacks and BOB in 2000 is estimated at \$108.3 million, generating 1,530 jobs in the Maricopa County economy.

Similar to the economic impact analysis, the net fiscal impact of BOB and the Diamondbacks is comprised of five elements:

- Taxes on out-of-town baseball game attendee spending;
- Taxes on local attendee spending at baseball games that would be saved and not spent elsewhere in the economy;
- Taxes on visiting baseball team spending;
- Taxes on net, new spending at other non-baseball Bank One Ballpark events; and
- Taxes levied on spending by direct and indirect employees supported by the Diamondbacks and Bank One Ballpark.

The methodology for calculating the net impact of the Diamondbacks and BOB involves applying State, County and local sales tax rates to the spending associated with the baseball team and stadium. In total, over \$4.4 million was generated in 2000 in new direct revenue to state, county and local governments. In addition to the spending by baseball game and event attendees, secondary fiscal impacts are also generated throughout Maricopa County by the employees supported by the team and stadium events. The fiscal impact of the spending by these employees in 2000 was over \$3.5 million. In total, the estimated net fiscal impact of the Diamondbacks and BOB in 2000 on state, county and local governments in Maricopa County is estimated at over \$7.9 million.

| Table C | | | | |
|-----------------------------------------------------------------------------------------------------------------------|--------------------|------------------|--------------------|--------------------|
| Net Fiscal Impact of Bank One Ballpark and Arizona Diamondbacks On Maricopa County in 2000 | | | | |
| Primary Fiscal Impacts | Government Revenue | | | Total |
| | State* | County | City | |
| Out-of-town attendee spending | \$1,443,000 | \$198,000 | \$627,000 | \$2,268,000 |
| Local attendee spending | \$878,000 | \$123,000 | \$295,000 | \$1,296,000 |
| Visiting baseball team spending | \$52,000 | \$7,000 | \$31,000 | \$90,000 |
| Non-baseball events | \$490,000 | \$68,000 | \$201,000 | \$759,000 |
| Subtotal | \$2,863,000 | \$396,000 | \$1,154,000 | \$4,413,000 |
| Secondary Fiscal Impacts of Employees Supported by Dbacks | \$2,376,000 | \$565,000 | \$572,000 | \$3,513,000 |
| Grand Total | \$5,239,000 | \$961,000 | \$1,726,000 | \$7,926,000 |
| *Portions of this revenue will be distributed to counties and cities under revenue sharing. | | | | |
| Sources: Bank One Ballpark Attendee Survey, Arizona Diamondbacks, Select Artists Associates, Elliott D. Pollack & Co. | | | | |

1.0 Introduction

Elliott D. Pollack and Company, in conjunction with the Behavior Research Center, was retained by the Maricopa County Stadium District and the Arizona Diamondbacks to undertake an economic and fiscal impact study of Bank One Ballpark (BOB) and the Arizona Diamondbacks baseball team. Similar studies were undertaken in 1993 and 1998 to assess the overall impact of the stadium and team on the local economy. The 1993 report, conducted by Deloitte and Touche, was undertaken prior to the selection of the site for the stadium and was based on projections of attendance and typical spending at Major League Baseball games. The latter study was completed in September 1998 by this firm and was based on financial data through the first half of the Diamondbacks inaugural season.

This analysis is based on attendance at Diamondbacks baseball games and non-baseball events held at the stadium during calendar year 2000. The study has been augmented by two research/public opinion surveys designed to address some of the shortcomings of economic impact studies of sports stadiums. Due to the lack of data on attendance and spending patterns of baseball game attendees, the prior two economic impact studies addressed the gross or total effect of BOB and the Diamondbacks. By contrast, this study estimates the net economic impact of the team and stadium. The term net impact refers to the new spending that occurs within Maricopa County as a direct result of the introduction of the stadium and baseball team to the economy. Data developed from the research/public opinion surveys was used to estimate these net impacts. The studies are included in the appendix to this report in their entirety.

One of the surveys administered for this analysis, the Bank One Ballpark Attendee Study, was conducted during home baseball games in September 2000 and addressed two primary issues: (1) the number of out-of-town visitors to Diamondbacks baseball games and their spending patterns and (2) the likelihood that local baseball fans would spend their leisure dollars on the other activities if the Diamondbacks were not located in the Phoenix area. The second survey, the Community Lifestyles Study, addressed the attitudes of Valley residents towards Bank One Ballpark and the Arizona Diamondbacks. This survey was based on in-depth telephone interviews conducted with a representative cross-section of Metro Phoenix residents.

This report is organized to provide an overview of economic and fiscal impact analysis and the results attributed to the stadium and the baseball team. The following section describes the methodology used in the study and the sources of information accessed. A summary of the findings of the two research/public opinion surveys is provided in Section 3.0. Section 4.0 outlines the economic impact of the Diamondbacks and ballpark on the metro Phoenix area. The fiscal impact of the team and stadium is summarized in Section 5.0.

2.0 Methodology and Sources

This report describes the economic and fiscal impact of Bank One Ballpark and the Arizona Diamondbacks during calendar year 2000. As well, it describes both the gross and net impacts, as defined below, based on data provided by the Diamondbacks, Select Artists Associates (booking manager for the stadium) and research/public opinion surveys conducted in the fall of 2000.

2.1 Economic Impact Analysis

Economic impact analysis examines the regional implications of an activity in terms of three basic measures: sales or output, earnings and job creation. The region that will economically benefit from presence of BOB and the Diamondbacks is defined in this study as Maricopa County (the term Metro Phoenix is interchangeable with Maricopa County in this report). Economic impacts are differentiated by type, known as direct, indirect, and induced, according to the manner in which the impacts are generated. For instance, direct employment consists of permanent jobs held by the project or facility employees. Indirect employment is those jobs created by businesses that provide goods and services essential to the operation of the project. These businesses range from manufacturers (who make goods) to wholesalers (who deliver goods) to janitorial firms who clean the buildings. Finally, the spending of the wages and salaries of the direct and indirect employees on items such as food, housing, transportation and medical services creates induced employment in all sectors of the economy throughout the metropolitan area.

Economists have developed multipliers that are used to estimate the indirect and induced impacts of various economic activities. These indirect and induced ripple effects occur as the wages of direct and indirect employees are re-spent in local businesses on retail goods and services. In response to this spending, local businesses hire more staff and expand their operations, creating additional jobs in retailing, wholesaling, manufacturing, transportation and other service sectors. These secondary effects are captured in the analysis conducted in this study.

Multipliers have been developed by both public and private organizations for each state and county in the country. The Minnesota IMPLAN Group developed the multipliers used in this study. The IMPLAN multipliers are used to estimate the impacts of project expenditures (gross receipt or sales), earnings (the sum of wages and salaries, proprietors income, and other labor income), and employment (number of jobs) on a region.

An important issue in the preparation of economic impact studies is the distinction between gross and net effects. The term “gross impact” refers to the total effect of a project or activity on a region without recognition of the components of that impact or the effect the project or activity may have on the remainder of the economy. For instance, assuming that local residents have a limited budget for leisure and entertainment activities, the introduction of a Major League Baseball team to a region does not necessarily result in an increase in entertainment spending by the residents living in that region. In fact, the team could cause reduced spending at

other individual leisure events or activities because of the finite dollars available for sporting and entertainment events.

The above phenomenon is known as the effect of substitution. Within the regional economy, and assuming finite dollars for leisure activities, the term substitution refers to the theory that some portion of the revenue derived by the Diamondbacks from local residents is not new spending, but rather a reallocation of dollars from other retail or entertainment venues. For instance, if the Diamondbacks' franchise had not located in the Metro Phoenix area, local residents would still have spent or "substituted" their limited leisure budgets on other sporting activities, movies or similar entertainment. Therefore, much of this spending cannot be directly attributed to the baseball team.

The term "net impact" refers to the new spending that occurs within the region as a direct result of the introduction of a facility or activity to the economy. An important benefit of a Major League Baseball team is its ability to attract out-of-town visitors to the region who are willing to spend dollars in the local economy. These are new dollars that otherwise would not have been spent locally except for the presence of the baseball team. In this sense, Major League Baseball is an important "export" industry that generates additional income and consumption locally much like the broader Arizona tourism industry and the high-tech industry that exports its goods to other parts of the country and the world. Likewise, certain non-baseball events held at the ballpark, such as motorcross competitions and football games, also attract out-of-town visitors and new spending.

With these issues in mind, the Behavior Research Center conducted a survey of Arizona Diamondbacks game attendees during the month of September 2000. The purpose of the study was two fold:

- For the local (Maricopa County) baseball fans, identification of their spending habits before, during and after baseball games and whether or not they would have spent or saved these dollars if they did not attend a Diamondbacks home game. The dollars that would be saved and not spent are considered to be new spending resulting from the presence of the Diamondbacks.
- Identification of the number of out-of-town fans to a home game and how much they spent while in Maricopa County. In addition, visitors were asked if the Diamondbacks was a major reason for traveling to the Valley. In the calculation of economic impact, greater weight was given to those visitors whose primary purpose was to attend a baseball game.

The above components form the basis for estimating the net economic impact of the Arizona Diamondbacks. The above surveys, to the knowledge of this firm, have not been conducted for many other economic impact studies. When combined with standard economic analysis, they assist in providing a clear picture of the true impact of the Arizona Diamondbacks.

2.2 Fiscal Impact Analysis

Fiscal impact analysis evaluates the public revenues and costs created by a particular activity. In fiscal impact analysis, the primary revenue sources of a city, county or state are analyzed to determine how the activity may financially affect them.

Fiscal impacts are categorized by type in this study, similar to economic impact analysis. The primary sources of revenue are the state, county and local sales taxes levied on Diamondbacks ticket sales, fan spending before, during and after baseball games, and on other revenue, such as advertising, collected by the Diamondbacks.

In addition to the primary fiscal impacts described above, secondary fiscal effects also occur as a result of the spending by direct, indirect and induced employees supported by the Diamondbacks. These employees live in all parts of Maricopa County, benefiting those communities from their spending on housing, retail goods and services. Examples of the types of secondary fiscal impacts that will be generated include state income taxes paid on wages, sales taxes on retail sales, property taxes and similar tax levies.

This study will focus on the benefits that accrue to the State of Arizona, Maricopa County, and the cities in Maricopa County, including the City of Phoenix. The analysis provides estimates of fiscal impact based on the tax structure of the state, county and cities during the 2000 baseball season. The fiscal impact figures cited in this report have been generated from information provided by a variety of sources including:

- Arizona Department of Economic Security;
- Arizona Tax Research Foundation;
- Maricopa County Assessor;
- Arizona Department of Revenue;
- U.S. Consumer Expenditure Survey.

Elliott D. Pollack and Company has relied upon data provided by the Arizona Diamondbacks and Select Artists Associates (the booking manager for ballpark) and surveys prepared by the Behavior Research Center. Unless otherwise stated, all dollar values are expressed in constant 2000 dollars.

3.0 Summary of Survey Findings

As noted previously, two research/public opinion surveys were conducted as part of this economic impact study. The Bank One Ballpark Attendee Survey was conducted during home baseball games and was targeted at identifying the visitation and spending patterns of both local and out-of-town Diamondbacks game attendees. The second survey, the Community Lifestyles Study, addressed the attitudes of Valley residents towards Bank One Ballpark and the Arizona Diamondbacks. The primary findings of the surveys are summarized in this section. The full text versions of the studies are included in the appendix to this report.

3.1 Bank One Ballpark Attendee Survey

This Attendee Survey was conducted to determine the visitation patterns of both local and out-of-area Arizona Diamondbacks game attendees to the downtown Phoenix area. The terms “out-of-area” or “out-of-town” are defined to mean a travel party living outside of Maricopa County. The information contained in this report is based on 404 intercept interviews conducted at Diamondbacks games between September 11th and 30th, 2000. Following are the primary findings and conclusions of the study.

- Sixteen percent (16%) of all Diamondbacks game attendee parties in 2000 were from outside Maricopa County. The typical local attendee party contained 3.1 members while the median party size for out-of-area attendees was 4.0. Therefore, due to the larger party size, approximately 20% of all Diamondbacks game attendees were from outside Maricopa County.
- The typical local attendee party spent \$9.57 outside BOB on game day on food, beverages, souvenirs and parking. In addition to game tickets, the typical local party also spent \$22.34 inside the ballpark on concessions and souvenirs.
- Sixty-six percent (66%) of local attendees indicated they would spend their money on something else if they did not attend Diamondbacks games while 27% said they would place the money in savings. Another 7% said they would save some money and spend some. Of this latter group, the survey indicated the local attendees would save 71% and spend 29%. In total, the above survey indicates that 32% of all local spending on the Diamondbacks would be saved and not spent on other entertainment or sports activities if the baseball team was not located in Metro Phoenix.
- Of the out-of-area attendee parties, 62% were from Arizona outside of Maricopa County and 38% were from outside Arizona.
- Thirty-nine percent (39%) of all out-of-area game attendees indicated that game attendance was their primary reason for visiting Metro Phoenix while 25% indicated it was a major reason. Another 25% indicated baseball was a minor reason for their trip while 12% said it was not a reason at all.

- Forty-five percent (45%) of out-of-area attendees living in Arizona made a day trip to Metro Phoenix for the game while the remainder stayed overnight. The median stay was 1.3 nights among these latter attendees. Seven percent of the out-of-state attendees made a day trip to Metro Phoenix for the game while the remainder stayed more than one night. The median stay was 2.2 nights among these latter attendees.
- The typical game attendee party from Arizona outside of Maricopa County spent \$131 per day on their trip to Metro Phoenix. By contrast, the typical out-of-state game attendee party spent \$269 per day.

The above data will be used to determine the net economic and fiscal impact of the Diamondbacks.

3.2 Community Lifestyle Study

The Community Lifestyles Study addressed the attitudes of the Valley residents towards Bank One Ballpark and the Arizona Diamondbacks. This survey was based on in-depth telephone interviews conducted with a representative cross-section of Metro Phoenix residents. Following are the primary findings and conclusions of the study.

- Valley residents hold a very positive attitude towards Bank One Ballpark and believe it has been an important addition to the Valley. Following are some survey results.
 - By better than an eight to one ratio, residents feel Bank One Ballpark has had a positive impact on the Valley - 74% positive vs. 9% negative.
 - The most positive impacts that residents feel the Ballpark has brought to the Valley are the economic benefits it provides the area and the entertainment value it provides.
 - Eighty-two percent (82%) of residents believe the Ballpark has had a positive impact on the development of downtown Phoenix.
 - Seventy-eight (78%) of residents believe the Ballpark has had a positive economic impact on the Valley.
 - By better than a five-to-one margin, residents indicate their impression of downtown Phoenix has improved since the Ballpark was completed - 54% more positive vs. 10% more negative.
- By nearly a three to one margin, residents believe that Bank One Ballpark was a good investment of public funds - 65% think it's a good investment vs. 24% think it's a bad investment.

- Valley residents also believe that the Arizona Diamondbacks baseball team has had a positive impact on the Valley and downtown Phoenix. Following are some detailed survey results.
 - Eighty-two percent (82%) of residents believe the Arizona Diamondbacks are a benefit to the community.
 - Seventy-nine percent (79%) of residents believe that having the Arizona Diamondbacks in town has had a positive impact on the Valley's image in other areas of the U.S.
 - Seventy-nine percent (79%) of residents believe that having the Arizona Diamondbacks play in downtown Phoenix has helped revitalize the downtown area.
 - A majority of residents, 52%, believe that having the Arizona Diamondbacks in town has improved the quality life in the Valley.

4.0 Economic Impact of BOB and Arizona Diamondbacks

This portion of the report outlines the both the gross and net economic impacts of BOB and the Arizona Diamondbacks. Analysis of the fiscal impacts of the project is provided in the Section 5.0. All dollar figures, unless otherwise stated, are expressed in constant 2000 dollars.

The impacts described in this section are regional in nature and will affect cities throughout the metro Phoenix area. While a substantial portion of spending associated with the team and stadium occurs in downtown Phoenix, benefits also accrue to many other cities in the county. For instance, out-of-town visitors will stay in hotels other than in the downtown and purchase meals or retail goods in various locations around the Valley. Employees supported by this spending will live in communities throughout the county, helping to disperse the Diamondbacks' impact across the region. This study will only evaluate the impact of the team and stadium on Maricopa County and will not assign benefits to individual communities.

This section will outline both the gross and net impacts of BOB and the Diamondbacks as defined earlier in this report. Gross impact refers to the effect of the team on Maricopa County based on total sales and expenditures. The analysis of the net impacts will focus on the new spending in the county that is directly attributable to Bank One Ballpark and the Diamondbacks.

4.1 Gross Economic Impact of BOB and Diamondbacks

The gross economic impact of BOB and the Diamondbacks is comprised of four primary elements. Those elements are described below in detail.

1. Diamondbacks Local Expenditures: The Diamondbacks provided estimates of expenditures made by the team in the local economy. Those expenditures include: a wide variety of normal business expenses; transportation costs; maintenance of Bank One Ballpark; salaries of front office, coaching, stadium operations and event personnel; and the contracts of Major League ballplayers. The coaches and scouting staff that are based out-of-town were deducted from the payroll schedule. The Major League Baseball player salaries were analyzed for their local impact as well. Of the 33 players currently on the payroll, only twelve list their permanent residence as Metro Phoenix. It was assumed that the remaining 21 players spend at least half of their disposable income outside Maricopa County. Spending patterns were based on an average annual salary of \$2.1 million per player.
2. Out-of-Stadium Spending: An important element is the out-of-stadium spending made by local and out-of-area game attendees in restaurants, hotels and retail stores. This spending is not captured by the Diamondbacks' organization and, therefore, is included in the gross economic impact.

3. Visiting Baseball Teams: Opposing baseball teams visiting Phoenix provide a small economic impact for the hospitality industry over a period of six months during the baseball season.
4. Other Bank One Ballpark Events: Over the past year, BOB has hosted twelve non-baseball events including football, basketball and soccer games, trade shows and concerts. These events generated attendance of over 250,000 persons at the stadium with the largest event drawing nearly 43,000 attendees. In addition to the ticket and concession sales occurring directly in Bank One Ballpark, an estimated 62,000 persons spent at least one night in Metro Phoenix while attending the events. The in-stadium and out-of-stadium spending impact of these events is included in the estimate of gross impact.

| Table 1 | | |
|---------------------------------------|----------|------------|
| Bank One Ballpark 2000 Event Schedule | | |
| Event | Date | Attendance |
| Fiesta Bowl Band Championships | Jan. 1 | 9,200 |
| Arizona National Boat Show | Jan. 7-9 | 23,384 |
| Festival of Faith | Jan. 12 | 26,356 |
| PACE Off Road | Jan. 22 | 17,719 |
| PACE Supercross | Jan. 29 | 42,841 |
| Fry's Fiesta Phoenix | Feb. 12 | 22,712 |
| Grand Canyon State Games | Jun. 15 | 15,000 |
| New Times 10K | Nov. 12 | 24,000 |
| US Women's Soccer | Dec. 17 | 10,577 |
| Hoops for the Cure | Dec. 27 | 16,482 |
| Insight.com Bowl | Dec. 28 | 35,314 |
| Fiesta Bowl Band Championships | Dec. 29 | 10,175 |
| Total | | 253,760 |
| Source: Select Artists Associates | | |

The non-baseball events generated a total of nearly \$16 million in local economic activity consisting of direct in-stadium spending as well as those expenditures by out-of-town visitors in local hotels, restaurants and retail establishments. Out-of-town visitors were assumed to spend on average two nights in Metro Phoenix with an average party size of 2.4 persons and typical spending of \$102 per person per day (the source of this spending data is the Arizona Department of Tourism).

The gross economic impact of Bank One Ballpark and the Diamondbacks is estimated at \$180.3 million based on direct spending in the local economy of \$96.1 million (see Table 2). The Diamondbacks account for about 83% of the impact with the remainder attributed to other, non-baseball events. The stadium and ball team support a total of 2,480 direct and indirect jobs.

| Table 2 Gross Economic Impact of Bank One Ballpark and Arizona Diamondbacks On Maricopa County in 2000 | | | | | | |
|--------------------------------------------------------------------------------------------------------------|----------------------------------|---------------------------------------|-----------------------|-------------------------|------------------|----------------------|
| Type of Impact | Diamondbacks' Local Expenditures | Baseball Game Out-of-Stadium Spending | | Visiting Baseball Teams | Other BOB Events | Total Impact |
| | | Local Attendees | Out-of-Area Attendees | | | |
| Direct spending | \$51,949,000 | \$6,212,000 | \$21,228,000 | \$988,000 | \$15,738,000 | \$96,115,000 |
| Indirect/Induced spending | \$44,909,000 | \$4,780,000 | \$19,245,000 | \$895,000 | \$14,354,000 | \$84,183,000 |
| Total spending | \$96,858,000 | \$10,992,000 | \$40,473,000 | \$1,883,000 | \$30,092,000 | \$180,298,000 |
| Wages | \$39,300,000 | \$4,466,000 | \$15,976,000 | \$743,000 | \$11,781,000 | \$72,266,000 |
| Jobs | 1,240 | 200 | 580 | 30 | 430 | 2,480 |

Sources: Bank One Ballpark Attendee Survey, Arizona Diamondbacks, Select Artists Associates, Elliott D. Pollack & Co.

The methodology used in this study to estimate the gross economic impact of Bank One Ballpark and the Diamondbacks differs from that used in previous studies. Those previous studies were conducted in 1993 prior to the construction of the stadium and in 1998 during the Diamondbacks' first year in the league. Both the studies used projected in-stadium and out-of-stadium gross revenues generated by the stadium and team to calculate the economic impact. Revenue for the 1998 study was projected for a full year based on the team's receipts through the first half of the season.

The two previous studies used the best information available at the time. Now, however, with three baseball seasons completed, better financial data is available from the Diamondbacks. In addition, the surveys conducted as part of this study permit a better understanding of the spending patterns of both local and out-of-town fans. The result is a much more accurate accounting of the impact of the stadium and Diamondbacks.

The gross economic impact of BOB and the Diamondbacks cited in this report is lower than that reported in the earlier studies. Some of this difference is due to the changes in the financial performance of the team and some is due to the methodology used in this study. For instance, both paid and gate attendance at baseball games is down nearly 20% from 1998. Not only does this reduce direct revenue to the team, but it also affects the amount of spending occurring outside the stadium. Also, actual out-of-stadium spending is lower than projected in the earlier reports based on the survey conducted for this study.

The methodology used in this study evaluated the impact of the Diamondbacks' expenditures, rather than revenue, on the local economy. This allowed a more accurate assessment of the local impact. In addition, baseball player salaries were more closely analyzed to arrive at a local impact figure. For instance, the high salaries of players place them in tax brackets that cause them to pay a substantial portion of their income to federal and state income taxes. These funds are not injected into the local economy. In addition, many players have their permanent residence outside of Metro Phoenix and spend a portion of their incomes in other parts of the country. Lastly, the information sources used in this study resulted in the use of more accurate, and often lower, economic

multipliers. All the above factors tended to reduce the gross economic impact of the team and stadium as reported in earlier studies.

4.2 Net Economic Impact of BOB and Diamondbacks

The net impact of BOB and the Diamondbacks is the economic effect that otherwise would not have occurred except for the existence of the ballpark and the team. It is comprised of four elements:

1. Spending by out-of-town visitors associated with their trip to a baseball game in Maricopa County;
2. Local attendee spending at baseball games that would be saved and not spent elsewhere in the local economy;
3. Visiting baseball team spending;
4. Net, new spending at other non-baseball Bank One Ballpark events.

Each of these components will be discussed further in this section.

4.2.1 Out-of-Town Visitor Spending at Baseball Games

The spending of out-of-town visitors is a primary component of the net impact of the Diamondbacks since it represents new dollars added to the Maricopa County economy. The game attendee survey found that 16% all parties attending Diamondbacks games were from outside Maricopa County (Table 3). Parties from Arizona living outside of Maricopa County spent \$131 per day on their trip while the typical out-of-state party spent \$269 per day. Based on an actual turnstile attendance of 2,505,800 persons for the 2000 Diamondbacks season, estimates of spending from these out-of-area visitors can be calculated.

| Table 3 Diamondback Attendance Estimates* | | | | |
|--------------------------------------------------------------------------------------------|-----------|-----------------------|--------------|-----------|
| | Local | Out-of-Area Attendees | | Total |
| | | From Arizona | Out-of-State | |
| Number of parties | 649,100 | 76,510 | 46,890 | 772,500 |
| Percent of total | 84.0% | 9.9% | 6.1% | |
| Number of visitors | 2,012,200 | 306,000 | 187,600 | 2,505,800 |
| Percent of total | 80.3% | 12.2% | 7.5% | |
| *Based on turnstile attendance | | | | |
| Sources: Bank One Ballpark Attendee Survey, Arizona Diamondbacks, Elliott D. Pollack & Co. | | | | |

Before finalizing the out-of-area impact calculation, spending figures were discounted or reduced by the importance of the Diamondbacks in the visitor's decision to visit Metro Phoenix. For instance, some visitors may have been on a personal or business trip to the area and happened to take in a baseball game during a home stand. Other visitors may have come to Phoenix for the sole purpose of attending one or more baseball games. The

attendee survey contained questions that tried to ascertain the importance of the Diamondbacks in the decision to visit Phoenix.

Table 4 outlines the importance of the Diamondbacks in the game attendee's decision to make the trip to Phoenix for both Arizona residents and out of state visitors. For Arizona residents living outside Maricopa County, nearly 70% of the visitors indicated that the Diamondbacks were a primary or major reason for the trip. Out-of-state residents were nearly evenly divided between the four categories of importance. In order to estimate the true net impact of the out-of-area visitor spending, the final column on Table 3 shows the percentage of spending that is attributed to the Diamondbacks. In all cases, however, a minimum of \$90.34 per party was attributed to the Diamondbacks to take into account ticket sales and the purchase of food, beverages, souvenirs and other retail goods. Game tickets were estimated at \$17.00 per person or \$68.00 per party and souvenir and retail sales were estimated at \$22.34 based on the spending patterns of local attendees as indicated in the attendee survey. This latter figure is considered to be conservative since out-of-town visitors typically spend more than local attendees.

| Table 4 | | | | |
|-----------------------------------------------------------------------------------------------------------|--------------|--------------|-------|------------------------------------------------|
| Importance of Diamondbacks Baseball Team In Decision to Visit Metro Phoenix (Out-of-Area Attendees) | | | | |
| Importance | From Arizona | Out-of-State | Total | % of Spending Attributed to Diamondbacks |
| Primary | 45% | 29% | 39% | 100% |
| Major | 24% | 25% | 25% | 75% |
| Minor | 24% | 26% | 25% | 25% |
| Not a reason | 7% | 20% | 12% | 0% |
| Sources: Bank One Ballpark Attendee Survey, Elliott D. Pollack & Co. | | | | |

After attributing \$90.34 per party in spending to the Diamondbacks, the remaining visitor expenditures were ascribed to the team according to the last column of Table 4. For those visitors indicating the Diamondbacks was the primary reason for their trip, 100% of their remaining spending is considered new economic activity in Metro Phoenix. If the Diamondbacks were a major reason for the trip, 75% of remaining spending was counted. If the minor category was chosen, only 25% was attributed to the team and 0% if the team played no part in the purpose of the trip.

As shown on Table 5, the total spending in Maricopa County by out-of-area visitors who attend Diamondbacks games was over \$41 million in 2000. Of that amount, \$28 million is directly attributable to the Diamondbacks' presence in Metro Phoenix and represents the net impact of the out-of-town visitors.

| Table 5 | | | |
|------------------------------------------------------------------------------------|--------------|--------------|--------------|
| Estimated Aggregate Spending Out-of-Town Visitors to Diamondbacks Games | | | |
| | From Arizona | Out-of-State | Total |
| Total Spending | \$13,188,000 | \$27,877,000 | \$41,065,000 |
| Net Spending Attributed to Diamondbacks | \$11,242,000 | \$17,061,000 | \$28,304,000 |
| Sources: Bank One Ballpark Attendee Survey, Elliott D. Pollack & Co. | | | |

4.2.2 Local Game Attendee Spending

As outlined in Section 2.0, much of the spending by local attendees at Diamondbacks games is not considered new spending in the local economy but rather a reallocation of dollars from other entertainment or sporting events. The BOB attendee survey was designed to ascertain the percentage of baseball game spending that would be spent on other entertainment events if the Diamondbacks were not located here and the percentage of spending that would be saved and not injected into the local economy. This latter spending is considered new economic activity attributable to the Diamondbacks.

Table 6 outlines the expected spending patterns of local game attendees if the Diamondbacks were not located in Metro Phoenix. Sixty six percent of the attendees would continue to spend money on some other type of entertainment or recreation activity. However, 27% of attendees said they would save the money while 7% would save some and spend some. Of this final 7% of attendees, an average of 71% of their Diamondbacks' game spending would be saved. In total, this means that approximately 32% of all current Diamondbacks local attendee spending would be saved rather than injected into the economy if the team was not located in Metro Phoenix.

| Table 6 | | |
|-------------------------------------------------------------------------------------|-----|-------------|
| Spending Patterns of Local Attendees If Did Not Attend Diamondbacks Game | | |
| | | Total Saved |
| Parties that would spend \$ on something else | 66% | |
| Parties that would save \$ | | 27% |
| Parties that would save some, spend some | 7% | |
| % of \$ that would be saved | 71% | |
| % of \$ that would be spent | 29% | |
| Total saved | | 5% |
| Total Diamondbacks spending that would be saved | | 32% |
| Sources: Bank One Ballpark Attendee Survey, Elliott D. Pollack & Co. | | |

Table 7 provides a calculation of the local attendee spending attributable to the Diamondbacks. In-stadium and out-of-stadium spending has been estimated through the attendee survey. Ticket sales have been estimated at an average \$17.00 per seat based on

the gross ticket sales reported by the Diamondbacks and the paid attendance for the 2000 season. The typical party size for local attendees is 3.1 persons. Overall, the typical party spent \$84.61 on a Diamondbacks' game yielding nearly \$55 million worth of aggregate spending. If the Diamondbacks were not located in Phoenix, approximately \$17.5 million of this amount would be saved and not injected into the economy. Therefore, this \$17.5 million is considered new spending attributable to the Diamondbacks.

| Table 7 | |
|--------------------------------------------------------------------------------|---------------------|
| Calculation of Local Attendee Spending Attributable to Diamondbacks | |
| Spending per party | |
| In-stadium spending | \$22.34 |
| Out-of-stadium spending | \$9.57 |
| Ticket sales | \$52.70 |
| Total per party | \$84.61 |
| Total local attendee parties | 649,100 |
| Aggregate local spending | \$54,920,000 |
| Percent that would be saved if did not attend games | 32% |
| Aggregate Dbacks local spending that would be saved | \$17,558,000 |
| Sources: Bank One Ballpark Attendee Survey, Elliott D. Pollack & Co. | |

4.2.3 Visiting Baseball Team Spending

Visiting baseball teams also provide an economic impact to Maricopa County during their three or four game series against the Diamondbacks. Through the assistance of the Diamondbacks, the spending associated with these visiting teams has been estimated. Total spending is shown on Table 8 at slightly under \$1 million.

| Table 8 | |
|----------------------------------------------------------------|-----------|
| Visiting Baseball Team Expenditures Maricopa County | |
| Hotel nights | 89 |
| Rooms/night | 50 |
| Room nights | 4,450 |
| Cost/room | \$110 |
| Food & beverage sales/room night | \$100 |
| Ground transport/day | \$600 |
| Total | \$988,000 |
| Sources: Arizona Diamondbacks, Elliott D. Pollack & Co. | |

4.2.4 Net New Spending at Other Bank One Ballpark Events

The net impact of the non-baseball events at the ballpark is limited to those activities that are new to the Phoenix area or have experienced increased attendance due to the event being held at Bank One Ballpark. Six of the twelve events held at the stadium qualify

under this definition, including the Festival of Faith, PACE Off Road, Fry's Fiesta Phoenix, U.S. Women's Soccer, Hoops for the Cure, and the Insight.com Bowl. The remaining events were all previously held at other locations in Metro Phoenix and cannot be considered as new spending in the local economy.

The new or enhanced events held at the stadium had a net attendance of over 123,000 persons, 35,300 of whom are estimated to be out-of-town visitors. Based on the spending patterns of these visitors, the direct spending introduced to the local economy by the new non-baseball events is estimated at \$9.7 million.

4.2.4 Total Net Economic Impact Attributable to the Diamondbacks and Bank One Ballpark

Total net direct spending attributable to the Diamondbacks in 2000 is estimated at approximately \$56.5 million (see Table 9). About 50% of that amount is the result of spending by out-of-area visitors to Diamondbacks baseball games. Local attendee spending contributed about 31% of the total or \$17.6 million while visiting baseball teams accounted for less than \$1 million. Non-baseball events at BOB added another 17% to the total economic activity.

Multipliers were applied to these figures to estimate the indirect and induced spending related to the Diamondbacks and non-baseball events as well as employment and wages supported by attendee spending. In total, the net impact of the Diamondbacks and other stadium events is estimated at \$108.3 million, generating 1,530 jobs in the Maricopa County economy.

| Table 9 | | | | | |
|-----------------------------------------------------------------------------------------------------------------------|------------------------------------------|------------------------------------|---------------------------------------|-------------------------------|----------------------|
| Net Economic Impact of Bank One Ballpark and Arizona Diamondbacks On Maricopa County in 2000 | | | | | |
| Type of Impact | Out-of-town game attendee spending | Local game attendee spending | Visiting baseball team spending | Other non- baseball events | Total |
| Direct spending | \$28,304,000 | \$17,558,000 | \$988,000 | \$9,662,000 | \$56,512,000 |
| Indirect/Induced spending | \$25,659,000 | \$16,411,000 | \$896,000 | \$8,824,000 | \$51,790,000 |
| Total spending | \$53,963,000 | \$33,969,000 | \$1,884,000 | \$18,485,000 | \$108,301,000 |
| Wages | \$21,300,000 | \$12,857,000 | \$743,000 | \$7,224,000 | \$42,124,000 |
| Jobs | 770 | 470 | 30 | 260 | 1,530 |
| Sources: Bank One Ballpark Attendee Survey, Arizona Diamondbacks, Select Artists Associates, Elliott D. Pollack & Co. | | | | | |

5.0 Fiscal Impact of BOB and Arizona Diamondbacks

As noted previously, fiscal impact analysis evaluates the effect of a particular facility or activity on state, county and city revenues. For this analysis, revenue estimates will be developed for the State of Arizona, Maricopa County, and the local cities in the county. While a substantial portion of the local revenues will be generated by Phoenix, an individual revenue estimate will not be provided for the city. Rather, these revenues will be combined into a total sum of all local cities in the county. The reason for this is the uncertainty of where much of the spending associated with the Diamondbacks and the stadium takes place. For instance, while ticket sales and in-stadium concessions benefit Phoenix, out-of-town visitors may stay in hotels and eat in restaurants in other neighboring communities. Where there is certainty as to where the spending takes place, such as ticket sales, City of Phoenix tax rates are used. Otherwise, a weighted average of all city tax rates in the county is used.

This section will outline both the gross and net fiscal impacts of BOB and the Diamondbacks as defined earlier in this report. Gross impact refers to the effect of the team on the state, county and cities revenues. The net fiscal impact analysis will estimate the effect of the new spending associated with the team and stadium on state, county and city revenues.

5.1 Revenue Sources

Fiscal impacts are categorized as primary or secondary in this study. The primary sources of revenue are the state, county and local sales taxes levied on Diamondbacks ticket sales; fan spending before, during and after baseball games; on other revenue, such as advertising, collected by the Diamondbacks; and on spending by attendees at non-baseball events held at BOB. Secondary fiscal effects also occur as a result of the spending by direct, indirect and induced employees supported by the Diamondbacks and other stadium events. These employees live in all parts of Maricopa County, benefiting those communities from their spending on housing, retail goods and services. Examples of the types of secondary fiscal impacts that will be generated include state income taxes paid on wages, sales taxes on retail sales, property taxes and similar tax levies.

This section outlines the applicable tax rates of the various jurisdictions and the types of taxes that will be collected as a result of the Diamondbacks presence in Metro Phoenix.

- Sales Tax

The Diamondbacks and BOB generate significant revenue from ticket sales, concession sales, advertising, parking and other spending related to baseball games and non-baseball events. The state and county charge sales taxes on this spending at 5.0% and 0.7% rates respectively. Portions of the state sales tax are redistributed through revenue sharing to cities and counties throughout Arizona based on a population-weighted formula. Estimates of the distribution of revenue sharing to local cities and the county are not provided in this study. The tax on

transient lodging, or the bed tax, is 5.5% for the state and 0.7% for the county. Estimates of retail sales tax receipts for local cities are based on the weighted average tax rate for all cities in Maricopa County or 1.64%. The City of Phoenix sales tax rate currently stands at 1.8%, an increase from 1.4% starting in June 2000. For this study, it was assumed that 30% of the baseball games, and therefore 30% of the spending, occurred before June 1, 2000 at the lower sales tax rate. The bed tax for the City of Phoenix is 3.0% and the weighted average bed tax for local cities in Maricopa County is 2.87%.

Fiscal impacts also result from the spending by direct and indirect employees supported by the operation of the ballpark and baseball team. Most of the employees supported by the project will reside within one of Maricopa County's cities or, at the very least, purchase goods from retailers located within a local municipality. Based on data from the U. S. Consumer Expenditure Survey, the projected extent of retail spending and resulting sales tax receipts was calculated.

- Property Taxes

While the stadium is publicly owned and does not pay property taxes, direct and indirect employees supported by the Diamondbacks pay county and city property taxes on homes they occupy. Real estate taxes are typically based on the assessed value of real property as determined by the County Assessor. The assessed value of property is calculated by multiplying the assessment ratio, determined by the property's use, by its full cash value. The assessment ratio for residential uses is 10%. Assessed value is expressed by the following equation:

$$\text{market value} \times \text{assessment ratio} = \text{assessed value}$$

The city tax rate used for this analysis is the weighted average rate of the cities in the metro area or \$1.3959 per \$100 of assessed value. The value of a typical Maricopa County housing unit has been calculated at approximately \$108,000. This value assumes that employees will occupy units in a pattern similar to the current inventory of housing in the Valley. Today, single family homes account for 66.5% of the housing stock, townhouses 7.9%, and apartments 25.6%. The current median sale price of these units is \$138,900, \$90,000, and \$33,700 respectively.

The property tax rate, expressed in dollars per \$100 of assessed value, is then applied to the assessed value to determine the amount of property tax. There are two types of property taxes – primary taxes used to finance general government operations, and secondary taxes used to finance general obligation bonded debt, budget overrides and special districts. The primary tax is based on what is known as the limited property value, calculated under a formula spelled out in State law. Secondary taxes are based on full cash value of property. The limited value cannot exceed full cash value.

The combined Maricopa County property tax rate (primary and secondary) for 1999 is \$3.2161 per \$100 of assessed value comprised of the following taxing entities or districts:

- General County tax;
- Community College tax;
- Flood Control District tax;
- Fire District Assistance tax;
- County Free Library tax;
- Central Arizona Water Conservation District tax.

- State Income Tax

The State of Arizona collects taxes on personal income. The tax rate used in the analysis averages 1.73% of gross income based on the most recently available income tax data from the state and the projected wage levels of direct and indirect jobs supported by the baseball team and stadium. Portions of this tax are redistributed through revenue sharing to cities throughout Arizona based on a population-weighted formula. Estimates of the distribution of revenue sharing to local cities are not provided in this study.

- State Unemployment Tax

Unemployment insurance tax for employees is 2.7% on the first \$7,000 of earned income. This factor is applied to the projected wages and earnings of direct and indirect employees.

- Gas Tax

The State of Arizona collects a motor vehicle fuel tax of \$0.18 per gallon. The tax revenue is calculated based on a vehicle traveling 12,000 miles per year at 20 miles per gallon. Portions of this tax are distributed to cities and counties throughout Arizona based on a formula that includes population and the origin of gasoline sales.

- Vehicle License Tax

The vehicle license tax is a personal property tax placed on vehicles at the time of annual registration. The average tax in Maricopa County is \$148 and funds are shared between the cities, county and state in accordance with population-based formulas.

The above tax categories represent the largest sources of revenues that will be generated to city, county and state governments.

5.2 Gross Fiscal Impact of BOB and Diamondbacks

The gross fiscal impact of Bank One Ballpark and the Diamondbacks is comprised of six elements. The first five elements are considered primary impacts and consist of taxes on direct revenues of the team and the spending of game and other event attendees. The sixth element results from the spending of employees supported by the Diamondbacks

and BOB events. The six components are listed below and discussed in further detail in the following paragraphs.

1. Taxes on Diamondbacks revenues;
2. Taxes levied on spending by local game attendees outside the stadium;
3. Taxes levied on spending by out-of-town game attendees outside the stadium;
4. Taxes levied on spending by visiting baseball teams;
5. Taxes levied on spending by visitors to non-baseball BOB events; and
6. Taxes levied on spending by direct and indirect employees supported by the Diamondbacks and BOB.

The Diamondbacks revenue is estimated at over \$121 million from ticket sales, concessions, parking, advertising, radio and television rights, and restaurant sales. This total produces more than \$9 million in state, county and local sales taxes.

According to the Bank One Ballpark attendee survey, the typical local attendee party spent \$9.57 per game outside the ballpark. Approximately 649,100 parties attended a game during the 2000 season, creating total spending of over \$6.2 million. This spending produced approximately \$456,000 in state, county and local sales taxes.

The Bank One Ballpark attendee study revealed that out-of-town game attendee parties spent \$131 per day if they originated their trip from inside Arizona and \$269 per day if they traveled from out-of-state. With a typical party size of four persons, it was assumed baseball tickets would cost \$68 per party (\$17 per person) and \$30 per party would be spent in the ballpark. The remaining spending is assumed to occur outside the ballpark, creating additional sales tax benefits for state, county and local governments. In total, this amounts to about \$22.7 million in spending and approximately \$1.8 million in sales and bed tax receipts.

Baseball teams that visit Metro Phoenix to play the Diamondbacks create spending on hotels, food and beverage, transportation, and similar expenses. As summarized in Table 8, total spending of these teams is estimated at just under \$1 million, producing approximately \$90,000 in sales and the bed tax receipts.

The non-baseball events held at Bank One Ballpark generate an additional \$21 million in spending on ticket sales, concessions, hotels, restaurants and other types of retail goods. A large portion of this spending results from out-of-town visitors to the events, particularly the Insight.com Bowl.

In addition to the spending by baseball game and event attendees, additional secondary fiscal impacts are generated throughout Maricopa County by the employees supported by the Diamondbacks and events held at the stadium. The economic impact analysis section of this report estimated that gross spending by game and event attendees supported 2,480 direct and indirect jobs in the local economy earning an average wage of approximately \$29,300. Tax revenue is generated from the spending by these employees on retail goods, groceries and similar everyday items. Elliott D. Pollack and Company has

developed a “spending” regression model based on data from the U. S. Consumer Expenditure Survey that estimates the projected extent of retail spending by income level. Sales tax rates are then applied to these spending estimates. The fiscal impact of the spending by the Diamondbacks/BOB events-supported employees in 2000 was nearly \$5.8 million in state, county and local taxes.

In total, the primary fiscal impacts generate \$12.6 million in revenue to the state, Maricopa County and cities in the Metro Phoenix area (Table 10). Including the secondary fiscal impacts, the total gross fiscal impact of the Diamondbacks and Bank One Ballpark to governmental entities is \$18.4 million.

| Table 10 | | | | |
|-----------------------------------------------------------------------------------------------------------------------|---------------------|--------------------|--------------------|---------------------|
| Gross Fiscal Impact of Bank One Ballpark and Arizona Diamondbacks On Maricopa County in 2000 | | | | |
| Primary Fiscal Impacts | State* | County | City | Total |
| Diamondbacks revenue | \$6,058,000 | \$848,000 | \$2,181,000 | \$9,087,000 |
| Out-of-town attendee spending | \$1,083,000 | \$149,000 | \$470,000 | \$1,702,000 |
| Local attendee spending | \$311,000 | \$43,000 | \$102,000 | \$456,000 |
| Visiting baseball team spending | \$52,000 | \$7,000 | \$31,000 | \$90,000 |
| Other BOB events | \$915,000 | \$126,000 | \$368,000 | \$1,409,000 |
| Subtotal Primary Impacts | \$8,419,000 | \$1,173,000 | \$3,152,000 | \$12,744,000 |
| Secondary Fiscal Impacts of Employees Supported by Dbacks | \$3,933,000 | \$915,000 | \$935,000 | \$5,783,000 |
| Grand Total | \$12,352,000 | \$2,088,000 | \$4,087,000 | \$18,527,000 |
| *Portions of this revenue will be distributed to counties and cities under revenue sharing. | | | | |
| Sources: Bank One Ballpark Attendee Survey, Arizona Diamondbacks, Select Artists Associates, Elliott D. Pollack & Co. | | | | |

5.3 Net Fiscal Impact of BOB and Diamondbacks

Similar to the economic impact analysis outlined in Section 4.0 of this report, the net fiscal impact of BOB and the Diamondbacks is comprised of five elements:

1. Taxes on out-of-town baseball game attendee spending, reduced according to the importance of the Diamondbacks in the visitor’s decision to visit Metro Phoenix;
2. Taxes on local attendee spending at baseball games that would be saved and not spent elsewhere in the economy;
3. Taxes on visiting baseball team spending;
4. Taxes on net, new spending at other non-baseball Bank One Ballpark events; and
5. Taxes levied on spending by direct and indirect employees supported by the Diamondbacks and Bank One Ballpark.

The methodology for calculating the net impact of the Diamondbacks was described in Section 4.2. State, County and local sales tax rates were applied to the spending associated with the baseball team and non-baseball events at the stadium to arrive at the net fiscal impact. For instance, the net spending of out-of-town visitors to baseball games was estimated in Table 5 as approximately \$28.3 million. Applying sales and bed tax rates of governmental entities to that amount results in revenue of approximately \$2.3 million. The net impact of local attendee spending attributable to the Diamondbacks was estimated at approximately \$17.6 million in Table 6. To reiterate, this is the spending on the Diamondbacks that would be saved by game attendees if the team was not located in Metro Phoenix. Applying sales tax rates to this amount produces about \$1.3 million in tax revenue. Visiting baseball team expenditures in Maricopa County were estimated at just under \$1 million. This spending produces approximately \$90,000 in sales and bed taxes to governmental entities. Lastly, new events held at Bank One Ballpark, plus out-of-town visitor spending at those event, produces another \$9.7 million in spending and \$750,000 in sales and bed taxes. In total, the team and stadium generated more than \$4.4 million in 2000 in new direct revenue to state, county and local governments.

In addition to the spending by baseball game attendees, additional secondary fiscal impacts are generated throughout Maricopa County by the employees supported by the Diamondbacks. The economic impact analysis section of this report estimated that spending by game attendees supported 1,530 net direct and indirect jobs in the local economy earning an average wage of approximately \$27,500. Tax revenue is generated from the spending by these employees on retail goods, groceries and similar everyday items. The impact of the spending by the Diamondbacks/BOB event-supported employees in 2000 was over \$3.5 million.

In total, the estimated net fiscal impact of the Diamondbacks and Bank One Ballpark in 2000 on state, county and local governments in Maricopa County is over \$7.9 million.

| Table 11 | | | | |
|-----------------------------------------------------------------------------------------------------------------------|--------------------|------------------|--------------------|--------------------|
| Net Fiscal Impact of Bank One Ballpark and Arizona Diamondbacks On Maricopa County in 2000 | | | | |
| Primary Fiscal Impacts | Government Revenue | | | Total |
| | State* | County | City | |
| Out-of-town attendee spending | \$1,443,000 | \$198,000 | \$627,000 | \$2,268,000 |
| Local attendee spending | \$878,000 | \$123,000 | \$295,000 | \$1,296,000 |
| Visiting baseball team spending | \$52,000 | \$7,000 | \$31,000 | \$90,000 |
| Non-baseball events | \$490,000 | \$68,000 | \$201,000 | \$759,000 |
| Subtotal | \$2,863,000 | \$396,000 | \$1,154,000 | \$4,413,000 |
| Secondary Fiscal Impacts of Employees Supported by Dbacks | \$2,376,000 | \$565,000 | \$572,000 | \$3,513,000 |
| Grand Total | \$5,239,000 | \$961,000 | \$1,726,000 | \$7,926,000 |
| *Portions of this revenue will be distributed to counties and cities under revenue sharing. | | | | |
| Sources: Bank One Ballpark Attendee Survey, Arizona Diamondbacks, Select Artists Associates, Elliott D. Pollack & Co. | | | | |

6.0 Appendix

1. Bank One Ballpark Attendee Survey, September 2000
2. Community Lifestyle Study, November 2000

BANK ONE BALLPARK ATTENDEE SURVEY

September 2000

Prepared for

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2000172ICOV Bank One Ballpark.wpd

TABLE OF CONTENTS

| | <u>Page</u> |
|-----------------------------------------------------------------------|-------------|
| INTRODUCTION | 1 |
| SUMMARY OF THE FINDINGS | 2 |
| ATTENDEE PROFILE | 2 |
| PARTY CONFIGURATION | 4 |
| NUMBER OF GAMES ATTENDED | 6 |
| DOWNTOWN SPENDING PATTERNS BY LOCAL ATTENDEES | 7 |
| SPENDING PATTERNS INSIDE BALLPARK BY LOCAL ATTENDEES | 9 |
| SPENDING PATTERNS IF GAMES NOT ATTENDED BY LOCAL ATTENDEES | 11 |
| IMPORTANCE OF GAME IN VISITATION DECISION AMONG OUT-OF-AREA ATTENDEES | 13 |
| LENGTH OF STAY AMONG OUT-OF-AREA ATTENDEES | 14 |
| ACCOMMODATIONS AMONG OUT-OF-AREA ATTENDEES | 15 |
| DAILY TRIP SPENDING PATTERNS AMONG OUT-OF-AREA ATTENDEES | 16 |

LIST OF TABLES

| | |
|-------------------------------------------------------------------------------------|----|
| TABLE 1: ATTENDEE PROFILE | 3 |
| TABLE 2: PARTY CONFIGURATION | 5 |
| TABLE 3: SEASON ATTENDANCE | 6 |
| TABLE 4: SPENDING PATTERNS OUTSIDE THE BALLPARK (LOCAL ATTENDEES) | 8 |
| TABLE 5: SPENDING PATTERNS INSIDE THE BALLPARK (LOCAL ATTENDEES) | 10 |
| TABLE 6: SPENDING PATTERNS IF GAMES NOT ATTENDED (LOCAL ATTENDEES) | 12 |
| TABLE 7: IMPORTANCE OF GAME ATTENDANCE IN DECISION TO VISIT (OUT-OF-AREA ATTENDEES) | 13 |
| TABLE 8: LENGTH OF STAY (OUT-OF-AREA ATTENDEES) | 14 |
| TABLE 9: ACCOMMODATION (OUT-OF-AREA ATTENDEES) | 15 |
| TABLE 10: TOTAL DAILY TRIP SPENDING PATTERNS (OUT-OF-AREA ATTENDEES) | 17 |

INTRODUCTION

This study was commissioned by Elliott D. Pollack & Company. The primary purpose of this effort was to determine the visitation patterns of both local and out-of-area Arizona Diamondbacks game attendees to the Downtown Phoenix area. More specifically, this project addressed the following issues:

- Attendee profile
- Game attendance patterns
- Downtown spending patterns among local attendees
- Trip patterns among out-of-area attendees
- Daily trip spending patterns among out-of-area attendees

The information contained in this report is based on 404 intercept interviews conducted at Diamondbacks' games on September 11-13, 15-17 and 29-30. A total of 204 of the interviews were conducted with local area residents (Maricopa County) and 200 with out-of-area residents. All of the interviewing on this project was conducted by professional interviewers of the Behavior Research Center. The margin of error for this survey is approximately +/-5.0 percent at a 95 percent confidence level.

The Behavior Research Center has presented all of the information germane to the basic research objectives of this project. However, if Elliott D. Pollack & Company management requires additional data retrieval or interpretation, we stand ready to provide such input.

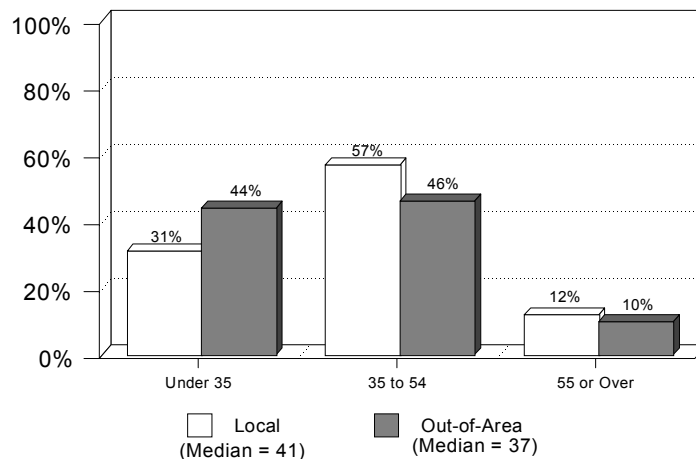
BEHAVIOR RESEARCH CENTER

SUMMARY OF THE FINDINGS

ATTENDEE PROFILE

- **This research reveals that 16 percent of Diamondbacks game attendees are from outside Maricopa County.** Sixty-two percent of out-of-area attendees live in other areas of Arizona while 38 percent are from out-of-state.
- The typical local game attendee is 41 years old with 57 percent falling between the ages of 35 and 54 years old, while the typical out-of-area game attendee is 37 years old with 50 percent falling between the ages of 25 and 44 years old.
- The median household income for local area attendees is \$50,000 – well above the metro area average of approximately \$39,000. The median household income for out-of-area attendees is even higher at \$60,400, with 36 percent earning \$70,000 or more.

AGE



INCOME

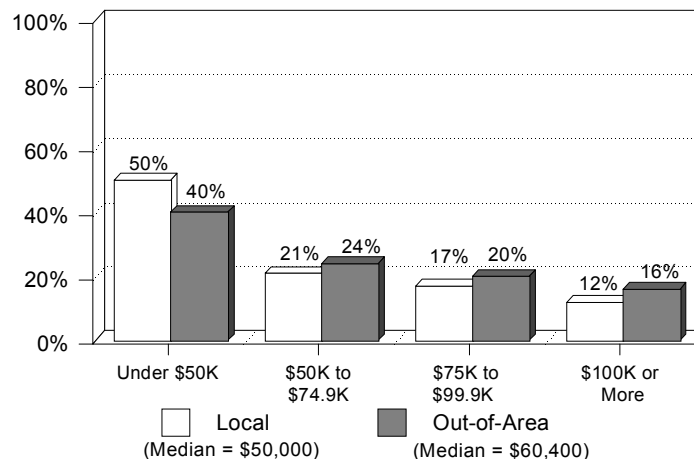


TABLE 1: ATTENDEE PROFILE

| | LOCAL AREA ATTENDEES ¹ | OUT-OF-AREA ATTENDEES |
|----------------------|--------------------------------------|--------------------------|
| <u>RESIDENCE</u> | | |
| Metro Phoenix | 100% | 0% |
| Other Arizona | 0 | 62 |
| Other state | 0 | 37 |
| Other country | <u>0</u> | <u>1</u> |
| | 100% | 100% |
| <u>AGE</u> | | |
| Under 25 | 11% | 19% |
| 25 to 34 | 20 | 25 |
| 35 to 44 | 32 | 25 |
| 45 to 54 | 25 | 21 |
| 55 to 64 | 7 | 8 |
| 65 or over | <u>5</u> | <u>2</u> |
| | 100% | 100% |
| MEDIAN | 41.0 | 37.1 |
| <u>INCOME</u> | | |
| Under \$25,000 | 10% | 8% |
| \$25,000 to \$49,999 | 40 | 32 |
| \$50,000 to \$74,999 | 21 | 24 |
| \$75,000 to \$99,999 | 17 | 20 |
| \$100,000 or over | <u>12</u> | <u>16</u> |
| | 100% | 100% |
| MEDIAN (000) | \$50.0 | \$60.4 |

¹Maricopa County

~~~~~

## PARTY CONFIGURATION

- The typical local attendees' game party contained 3.1 members with 52 percent of parties containing three or more persons. The median party size for out-of-area attendees is 4.0 with 64 percent of out-of-area parties including at least three people.
- Fifty-nine percent of local area attendees attended with family members, while 43 percent attended with friends, 13 percent with co-workers and four percent with business associates. Among out-of-area attendees the figures are nearly identical.
- Ninety-one percent of local attendees attended the game for non-business purposes, compared to 88 percent among out-of-area attendees.

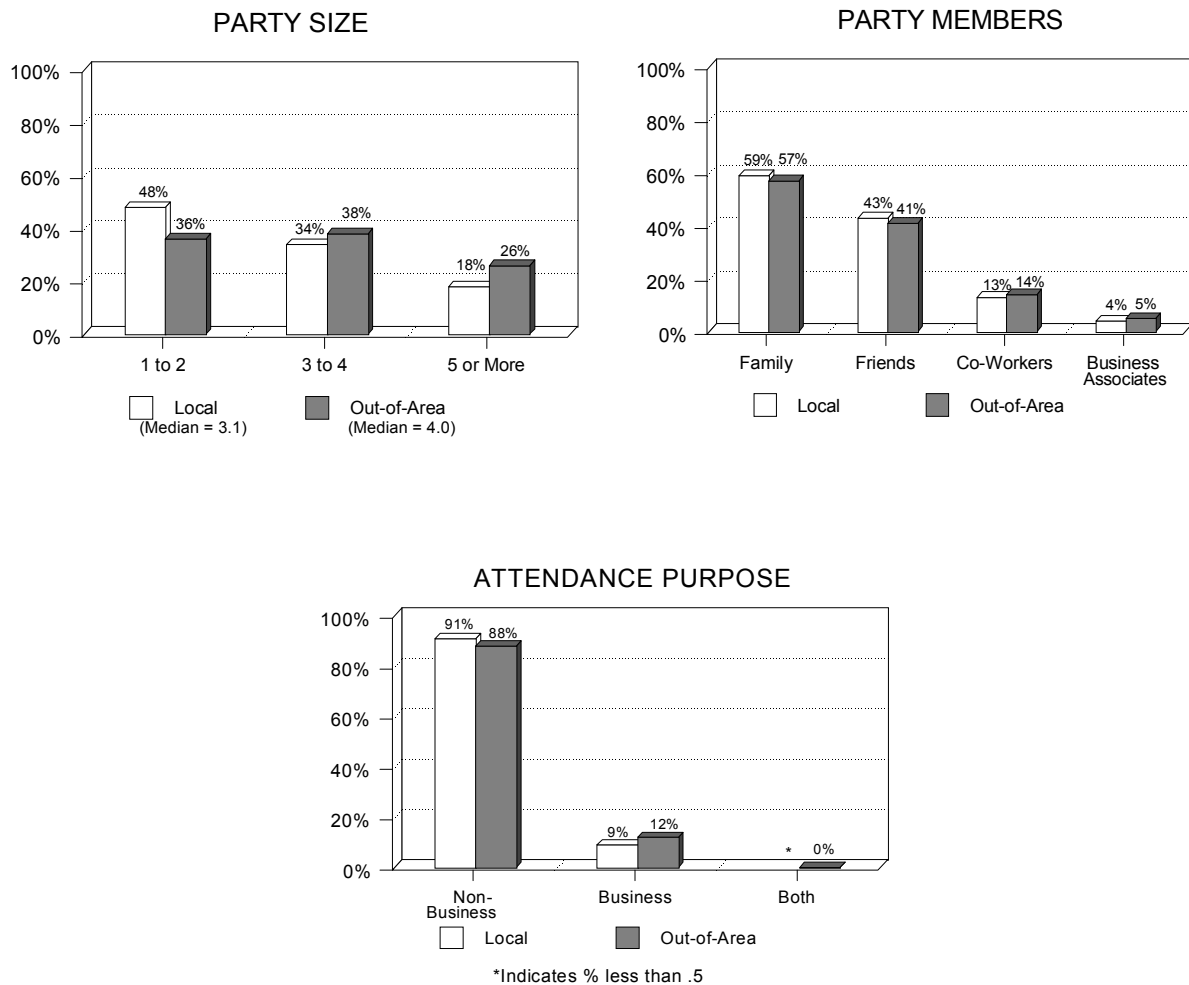


TABLE 2: PARTY CONFIGURATION

|                               | LOCAL AREA<br>ATTENDEES | OUT-OF-AREA<br>ATTENDEES |
|-------------------------------|-------------------------|--------------------------|
| <u>PARTY SIZE</u>             |                         |                          |
| 1                             | 9%                      | 4%                       |
| 2                             | 39                      | 32                       |
| 3                             | 11                      | 14                       |
| 4                             | 23                      | 24                       |
| 5 or more                     | <u>18</u>               | <u>26</u>                |
|                               | 100%                    | 100%                     |
| <br>MEDIAN                    | <br>3.1                 | <br>4.0                  |
| <u>PARTY MEMBERS</u>          |                         |                          |
| Family                        | 59%                     | 57%                      |
| Friends                       | 43                      | 41                       |
| Co-workers                    | 13                      | 14                       |
| Business associates           | <u>4</u>                | <u>5</u>                 |
|                               | 119%                    | 117%                     |
| <br><u>ATTENDANCE PURPOSE</u> |                         |                          |
| Non-business                  | 91%                     | 88%                      |
| Business                      | 9                       | 12                       |
| Both                          | <u>*</u>                | <u>0</u>                 |
|                               | 100%                    | 100%                     |

Totals may exceed 100% due to multiple responses

\*Indicates % less than .5

~~~~~

NUMBER OF GAMES ATTENDED

- The typical local area attendee attended 8.8 games during the 2000 season with 44 percent attending 10 or more games. In comparison, the typical out-of-area attendee attended 1.9 games during the season with 52 percent attending one or two games.
- Twenty-nine percent of local attendees and 16 percent of out-of-area attendees are Diamondbacks season ticket holders.
- Eighty-eight percent of local attendees and 93 percent of out-of-area attendees do not hold season tickets to any other local professional sports teams.

TABLE 3: SEASON ATTENDANCE

| | LOCAL AREA ATTENDEES | OUT-OF-AREA ATTENDEES |
|-----------------------------|-------------------------|--------------------------|
| GAMES ATTENDED | | |
| <u>2000 SEASON</u> | | |
| 1 to 2 | 17% | 52% |
| 3 to 4 | 14 | 18 |
| 5 to 9 | 25 | 14 |
| 10 to 14 | 15 | 8 |
| 15 to 19 | 5 | 2 |
| 20 or more | <u>24</u> | <u>6</u> |
| | 100% | 100% |
| MEDIAN (GAMES) | 8.8 | 1.9 |
| DIAMONDBACKS | | |
| <u>SEASON TICKET HOLDER</u> | | |
| Yes | 29% | 16% |
| No | <u>71</u> | <u>84</u> |
| | 100% | 100% |
| SEASON TICKETS | | |
| <u>TO OTHER LOCAL</u> | | |
| <u>PRO SPORTS TEAMS</u> | | |
| None | 88% | 93% |
| Cardinals | 8 | 4 |
| Suns | 2 | 4 |
| Coyotes | 2 | 2 |
| Rattlers | 1 | 1 |
| Mercury | <u>1</u> | <u>0</u> |
| | 102% | 104% |

*Totals may exceed 100% due to multiple responses

~~~~~

## DOWNTOWN SPENDING PATTERNS BY LOCAL ATTENDEES

- The typical local attendee party spent \$9.57 outside the ballpark during their visit with 27 percent spending \$21 or more.
- The data also reveals that 49 percent of local attendees purchase food or beverages outside the ballpark while 16 percent purchase souvenirs or other retail items. Additionally, 62 percent of local attendees pay for parking in the downtown area.

## TOTAL OUTSIDE BALLPARK SPENDING BY LOCAL ATTENDEES

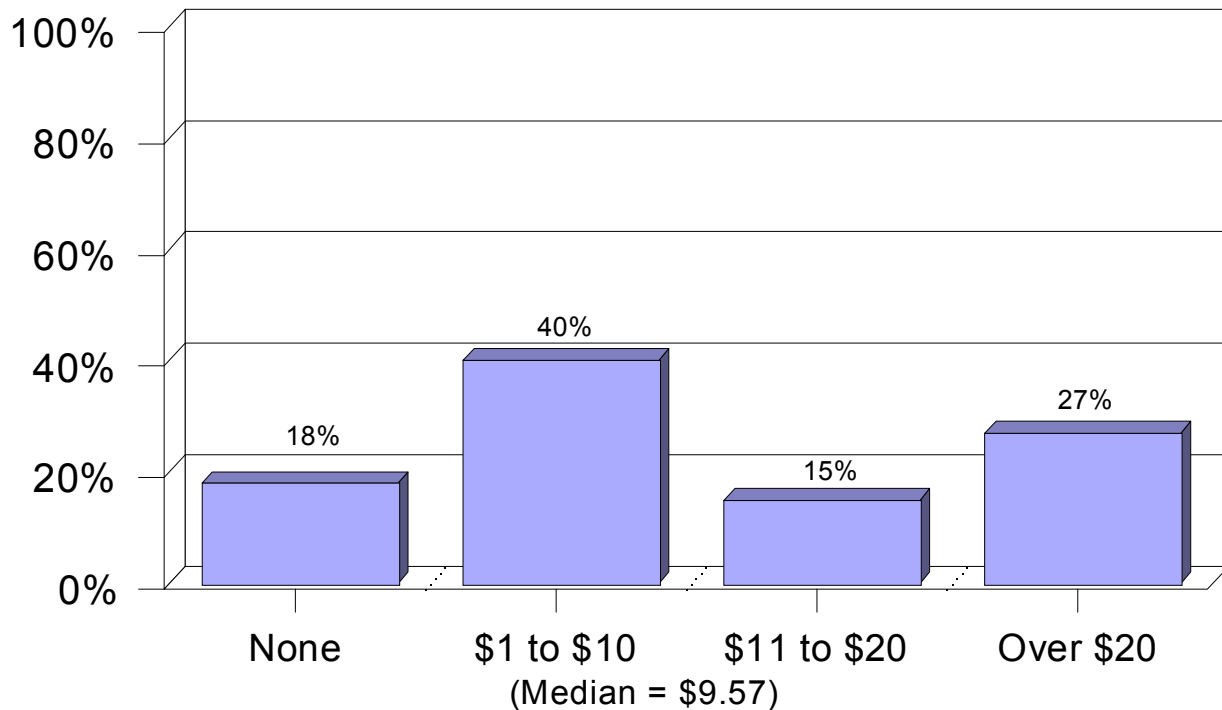


TABLE 4: SPENDING PATTERNS OUTSIDE  
THE BALLPARK (LOCAL ATTENDEES)

“Next, how much money have, or will you and any other people in your party attending this game spend outside the ballpark, either before or after the game (today/tonight) on each of the following items. Please include the combined spending of all members of your party and exclude any spending inside the ballpark. . .”

FOOD/BEVERAGE

|              |          |
|--------------|----------|
| None         | 51%      |
| Under \$5    | 13       |
| \$6 to \$10  | 9        |
| \$11 to \$20 | 13       |
| \$21 to \$50 | 11       |
| Over \$50    | <u>3</u> |
|              | 100%     |

MEDIAN\* \$13.11

SOUVENIRS/RETAIL

|              |          |
|--------------|----------|
| None         | 84%      |
| Under \$5    | 3        |
| \$6 to \$10  | 4        |
| \$11 to \$20 | 5        |
| \$21 to \$50 | 2        |
| Over \$50    | <u>2</u> |
|              | 100%     |

MEDIAN\* \$13.50

PARKING

|              |          |
|--------------|----------|
| None         | 38%      |
| Under \$5    | 17       |
| \$6 to \$10  | 39       |
| \$11 to \$20 | <u>6</u> |
|              | 100%     |

MEDIAN\* \$7.84

TOTAL

|              |          |
|--------------|----------|
| None         | 18%      |
| Under \$5    | 13       |
| \$6 to \$10  | 27       |
| \$11 to \$20 | 15       |
| \$21 to \$50 | 19       |
| Over \$50    | <u>8</u> |
|              | 100%     |

MEDIAN AMONG ALL ATTENDEES \$9.57

\*Among those spending on each item

~~~~~

SPENDING PATTERNS INSIDE BALLPARK BY LOCAL ATTENDEES

- The vast majority of local attendee parties (92%) spend money inside the ballpark with the typical party spending \$22.34.
- Eighty-nine percent of local attendee parties who spend money inside the ballpark purchase food or drinks while 25 percent purchase retail goods.

TOTAL INSIDE BALLPARK SPENDING BY LOCAL ATTENDEES

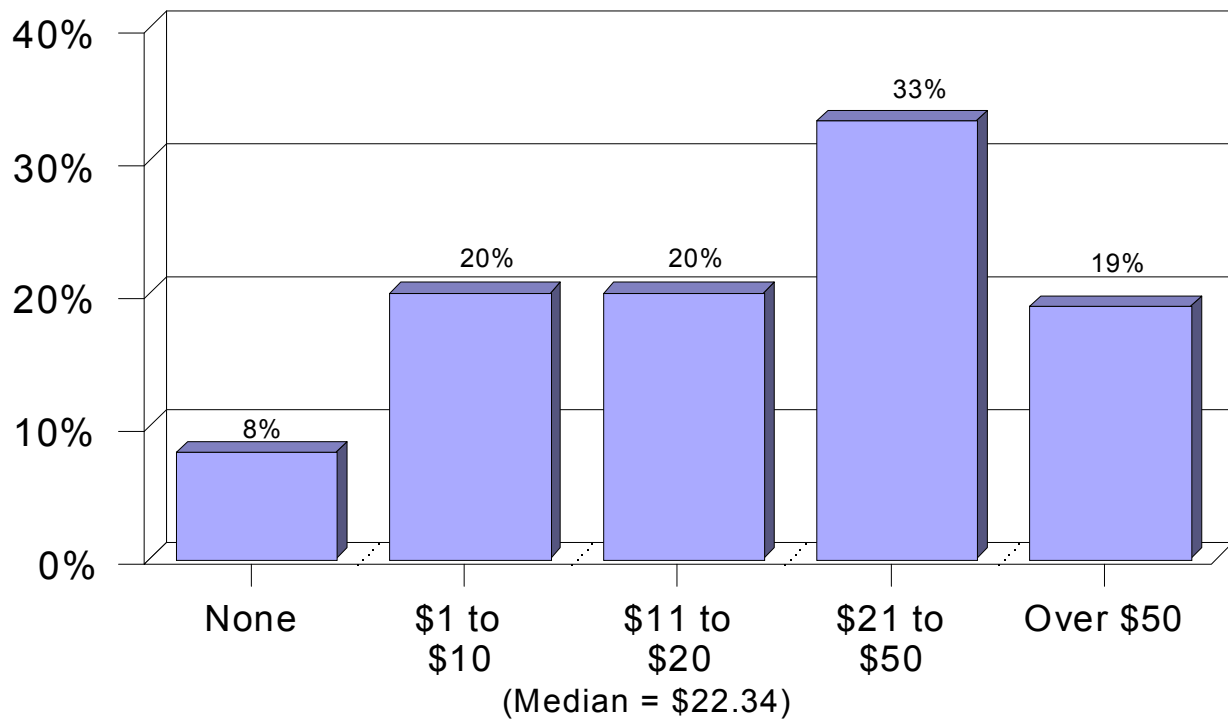


TABLE 5: SPENDING PATTERNS INSIDE
THE BALLPARK (LOCAL ATTENDEES)

“And how much money will you and any other people in your party attending this game spend inside the ballpark during the game on each of the following items?

| | |
|----------------------|-----------|
| <u>FOOD/BEVERAGE</u> | |
| None | 11% |
| Under \$5 | 7 |
| \$6 to \$10 | 15 |
| \$11 to \$20 | 24 |
| \$21 to \$50 | 33 |
| Over \$50 | <u>10</u> |
| | 100% |

| | |
|---------|---------|
| MEDIAN* | \$20.49 |
|---------|---------|

| | |
|-------------------------|----------|
| <u>SOUVENIRS/RETAIL</u> | |
| None | 75% |
| Under \$5 | 3 |
| \$6 to \$10 | 4 |
| \$11 to \$20 | 8 |
| \$21 to \$50 | 8 |
| Over \$50 | <u>2</u> |
| | 100% |

| | |
|---------|---------|
| MEDIAN* | \$17.56 |
|---------|---------|

| | |
|--------------|-----------|
| <u>TOTAL</u> | |
| None | 8% |
| Under \$5 | 7 |
| \$6 to \$10 | 13 |
| \$11 to \$20 | 20 |
| \$21 to \$50 | 33 |
| Over \$50 | <u>19</u> |
| | 100% |

| | |
|----------------------------|---------|
| MEDIAN AMONG ALL ATTENDEES | \$22.34 |
|----------------------------|---------|

*Among those spending on each item

~~~~~



### SPENDING PATTERNS IF GAMES NOT ATTENDED BY LOCAL ATTENDEES

- Sixty-six percent of local attendees would spend their money on something else if they did not attend Diamondbacks games while 27 percent would save it and seven percent would both save some and spend some.
- The typical local attendee who would save either all or some of the money they would not spend on Diamondbacks games would save 71 percent.
- Among local attendees who would spend either all or some of the money they would not spend on Diamondbacks games, 89 percent would spend it on entertainment or recreation and 19 percent would spend it on living expenses.

### PERCENT ATTENDEES WOULD SAVE (AMONG THOSE SAVING SOME MONEY)

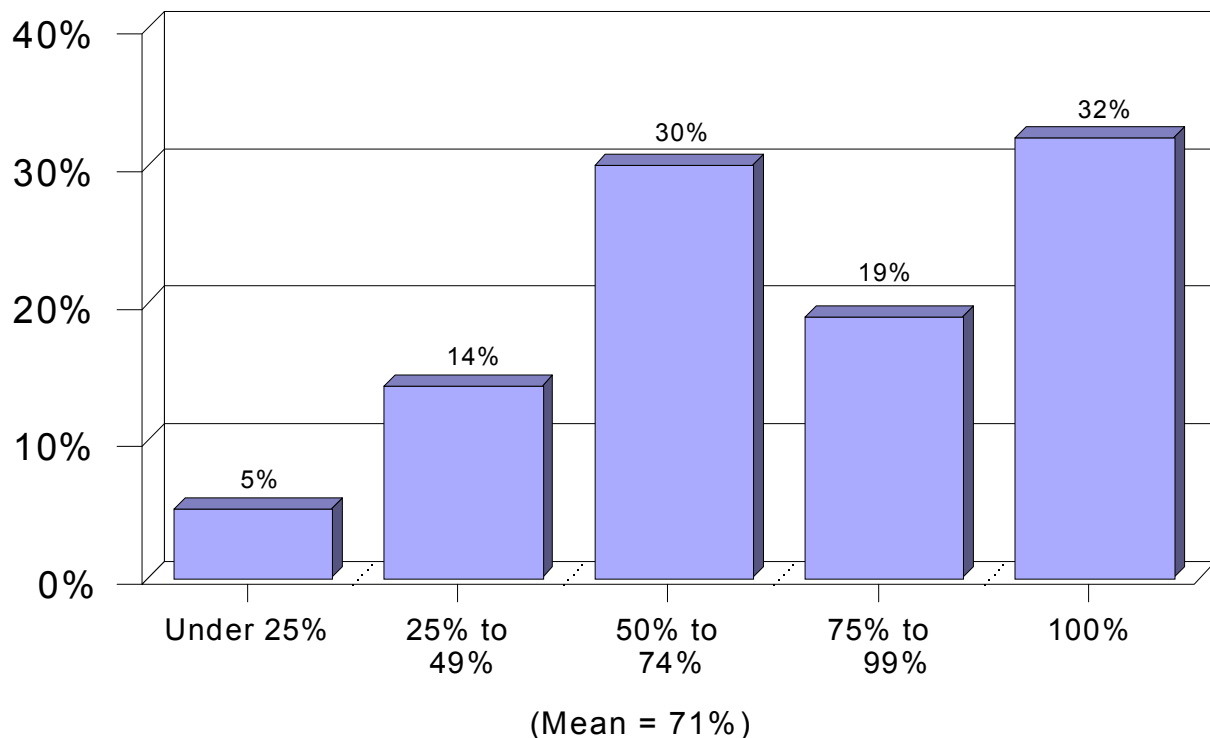


TABLE 6: SPENDING PATTERNS IF GAMES  
NOT ATTENDED (LOCAL ATTENDEES)

“Next, if you did not attend Diamondbacks home games, what would you do with the money not spent to attend games – would you save it or spend it on something else?”

|                         |          |
|-------------------------|----------|
| Save it                 | 27%      |
| Spend on something else | 66       |
| Save some/spend some    | <u>7</u> |
|                         | 100%     |

(AMONG THOSE WHO WOULD SAVE SOME)

“What percent would you save?”

|          |           |
|----------|-----------|
| Under 25 | 5%        |
| 25 to 49 | 14        |
| 50 to 74 | 30        |
| 75 to 99 | 19        |
| 100      | <u>32</u> |
|          | 100%      |
| MEAN     | 71%       |

(AMONG THOSE WHO WOULD SPEND SOME)

“What sort of things would you spend it on? (PROBE) What else?”

|                                                                                                                |     |
|----------------------------------------------------------------------------------------------------------------|-----|
| <b>ENTERTAINMENT/RECREATION</b><br>(movies, eating out, bars, other<br>sports, vacations, golf, hobbies, etc.) | 89% |
|----------------------------------------------------------------------------------------------------------------|-----|

|                                                                                                 |    |
|-------------------------------------------------------------------------------------------------|----|
| <b>BASIC LIVING EXPENSES</b><br>(food, gas, insurance, pay bills,<br>clothing, education, etc.) | 19 |
|-------------------------------------------------------------------------------------------------|----|

|          |          |
|----------|----------|
| Not sure | <u>4</u> |
|          | 112%*    |

\*Total exceeds 100% due to multiple responses

~~~~~

IMPORTANCE OF GAME IN VISITATION DECISION AMONG OUT-OF-AREA ATTENDEES

- Thirty-nine percent of all out-of-area game attendees indicate that game attendance was their primary reason for visiting metro Phoenix while 25 percent indicate it was a major reason. Among attendees living in other areas of Arizona the primary figure rises to 45 percent.

TABLE 7: IMPORTANCE OF GAME
ATTENDANCE IN DECISION TO VISIT
(OUT-OF-AREA ATTENDEES)

“How important was attending Diamondbacks games in your decision to visit metro Phoenix – was it your primary reason, a major reason, a minor reason or not a reason?”

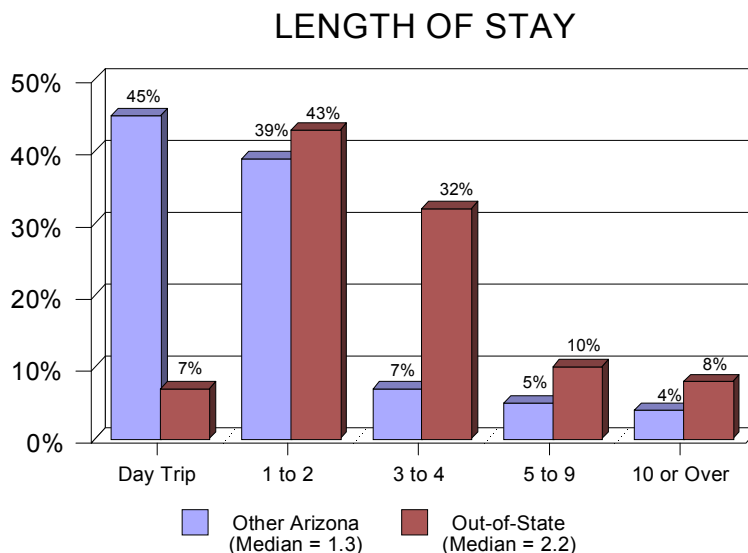
| | RESIDENCE | | |
|--------------|-----------|------------------|------------------|
| | TOTAL | Other Arizona | Out-of- State |
| Primary | 39% | 45% | 29% |
| Major | 25 | 24 | 25 |
| Minor | 25 | 24 | 26 |
| Not a reason | <u>12</u> | <u>7</u> | <u>20</u> |
| | 101%* | 100% | 100% |

*Exceeds 100% due to rounding

~~~~~

## LENGTH OF STAY AMONG OUT-OF-AREA ATTENDEES

- Forty-five percent of attendees living in other areas of Arizona made a day trip to metro Phoenix for the game while 39 percent spent one to two nights in metro Phoenix. The median stay was 1.3 nights among these attendees.
- Seven percent of out-of-state attendees made a day trip to metro Phoenix for the game while 43 percent stayed one to two nights and 50 percent spent three nights or more. The median stay was 2.2 nights among these attendees.



**TABLE 8: LENGTH OF STAY  
(OUT-OF-AREA ATTENDEES)**

“How many nights, in total, will you spend in metro Phoenix on your trip?”

|                  | RESIDENCE     |              |
|------------------|---------------|--------------|
|                  | Other Arizona | Out-of-State |
| Day trip         | 45%           | 7%           |
| 1 to 2           | 39            | 43           |
| 3 to 4           | 7             | 32           |
| 5 to 9           | 5             | 10           |
| 10 or over       | 4             | 8            |
|                  | 100%          | 100%         |
| MEDIAN (NIGHTS)* | 1.3           | 2.2          |

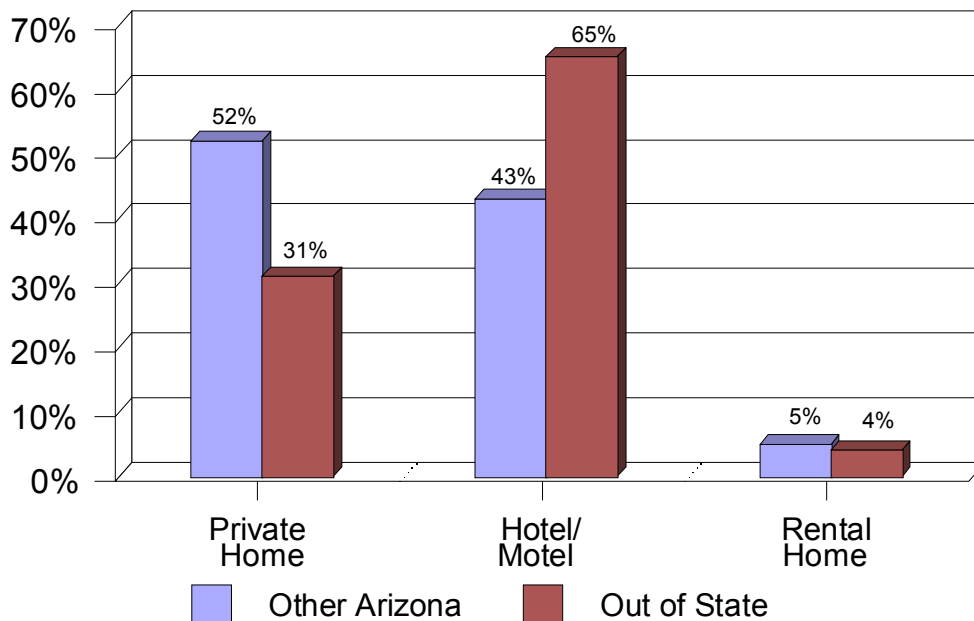
\*Among those spending at least one night

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ACCOMMODATIONS AMONG OUT-OF-AREA ATTENDEES

- Fifty-two percent of overnight visitors living in other areas of Arizona stayed at a private home as a guest and 43 percent stayed in a hotel or motel.
- Sixty-five percent of overnight visitors from out-of-state stayed in a hotel or motel, while 31 percent stayed at a private home as a guest.

ACCOMMODATIONS



**TABLE 9: ACCOMMODATION
(OUT-OF-AREA ATTENDEES)**

| | RESIDENCE | |
|---------------------------------|---------------|--------------|
| | Other Arizona | Out-of-State |
| Private home as guest | 52% | 31% |
| Hotel/motel | 43 | 65 |
| Rental home, apartment or condo | <u>5</u> | <u>4</u> |
| | 100% | 100% |

Note: among overnight visitors

~~~~~

### DAILY TRIP SPENDING PATTERNS AMONG OUT-OF-AREA ATTENDEES

- The typical game attendee party from other areas of Arizona spent \$131 per day on their trip to metro Phoenix with 70 percent spending less than \$200.
- In contrast, the typical out-of-state game attendee party spent \$269 per day with 44 percent spending more than \$300.

## TOTAL DAILY SPENDING

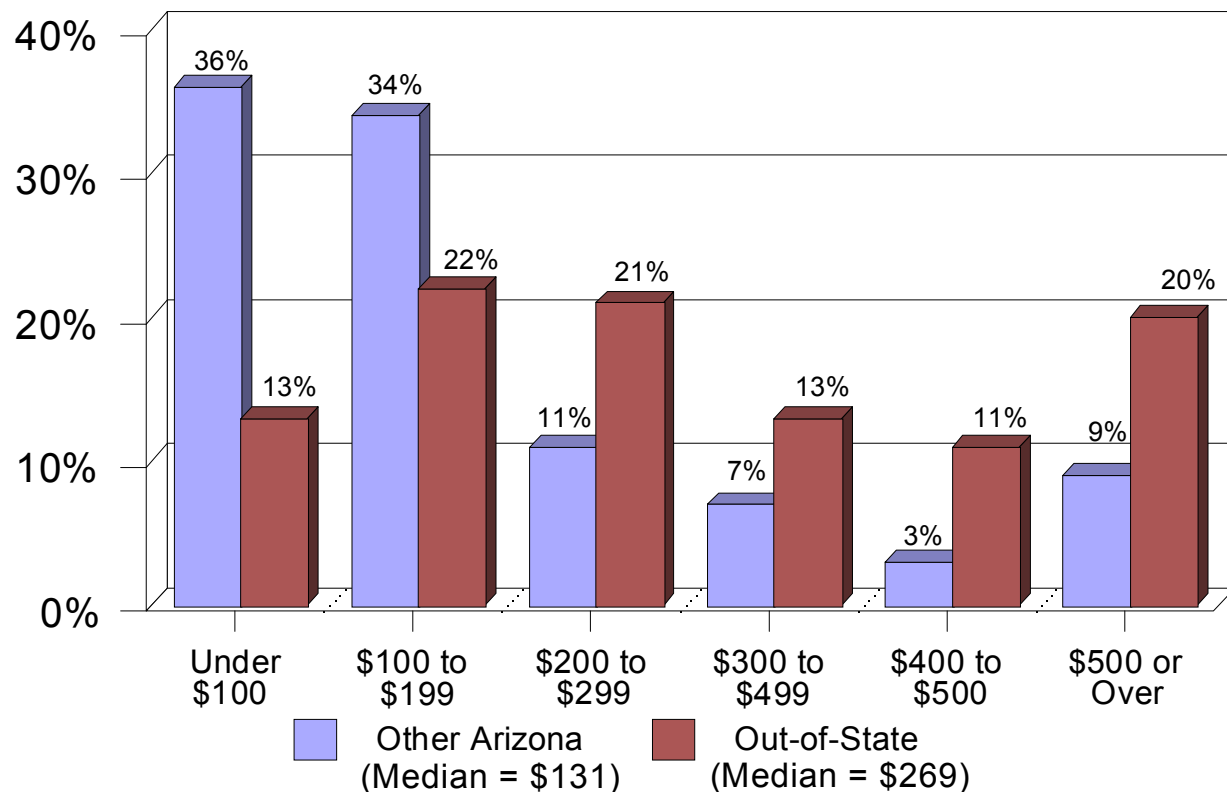


TABLE 10: TOTAL DAILY TRIP SPENDING  
PATTERNS (OUT-OF-AREA ATTENDEES)

“Now we’d like to get some idea of your spending patters while you’re in the metro Phoenix area. Thinking about a typical day during your visit, on average, how much are you and your travel party spending each day on the following items? When responding, please include the combined spending for all members of your travel party.”

|                           | RESIDENCE        |                  |
|---------------------------|------------------|------------------|
|                           | Other<br>Arizona | Out-of-<br>State |
| Under \$100               | 36%              | 13%              |
| \$100 to \$199            | 34               | 22               |
| \$200 to \$299            | 11               | 21               |
| \$300 to \$399            | 7                | 13               |
| \$400 to \$499            | 3                | 11               |
| \$500 or more             | <u>9</u>         | <u>20</u>        |
|                           | 100%             | 100%             |
| <br>MEDIAN DAILY SPENDING | <br>\$131        | <br>\$269        |

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COMMUNITY LIFESTYLE STUDY

November 2000

Prepared for

Elliott D. Pollack & Company
Scottsdale, Arizona

Prepared by

Behavior Research Center
1101 N. First Street
Phoenix, Arizona 85004
(602) 258-4554



TABLE OF CONTENTS

| | <u>Page</u> |
|--------------------------------------------------------------------|-------------|
| INTRODUCTION | 1 |
| KEY FINDINGS | 2 |
| SUMMARY OF THE FINDINGS | 3 |
| IMPACT OF SELECTED FACILITIES ON THE VALLEY | 3 |
| BANK ONE BALLPARK'S VALLEY PRESENCE – PROS AND CONS | 5 |
| CHANGES IN IMPRESSION OF DOWNTOWN PHOENIX SINCE BALLPARK COMPLETED | 7 |
| BALLPARK AS A PUBLIC INVESTMENT | 8 |
| DIAMONDBACKS AS BENEFIT TO THE COMMUNITY | 9 |
| ATTITUDES ABOUT BANK ONE BALLPARK/DIAMONDBACKS | 11 |
| DIAMONDBACKS GAME ATTENDANCE | 12 |
| OTHER BANK ONE BALLPARK EVENTS ATTENDED | 13 |
| METHODOLOGY | 15 |

LIST OF TABLES

| | | |
|-----------|-------------------------------------------------------|----|
| TABLE 1: | EVALUATION OF SELECTED VALLEY FACILITIES | 3 |
| TABLE 2: | DETAIL EVALUATION OF BANK ONE BALLPARK | 4 |
| TABLE 3: | POSITIVE BENEFITS OF BANK ONE BALLPARK | 5 |
| TABLE 4: | DRAWBACKS OF BANK ONE BALLPARK | 6 |
| TABLE 5: | CHANGES IN IMPRESSION OF DOWNTOWN PHOENIX | 7 |
| TABLE 6: | BANK ONE BALLPARK AS A PUBLIC INVESTMENT | 8 |
| TABLE 7: | DIAMONDBACKS AS BENEFIT TO COMMUNITY | 9 |
| TABLE 8: | REASONS BELIEVE DIAMONDBACKS BENEFIT/NOT A BENEFIT | 10 |
| TABLE 9: | SELECT ATTITUDES ABOUT BANK ONE BALLPARK/DIAMONDBACKS | 11 |
| TABLE 10: | DIAMONDBACKS GAME ATTENDANCE | 12 |
| TABLE 11: | VISITS TO BANK ONE BALLPARK FOR OTHER EVENTS | 13 |
| TABLE 12: | INTEREST IN SELECTED BANK ONE BALLPARK EVENTS | 14 |

INTRODUCTION

This study was commissioned by Elliott D. Pollack & Company. The primary purpose of this effort was to determine the attitudes of Valley residents toward Bank One Ballpark. More specifically, this project addressed the following issues:

- m Impact of Bank One Ballpark on Valley
- m Positive benefits of Bank One Ballpark
- m Drawbacks of Bank One Ballpark
- m Bank One Ballpark as a public investment
- m Impact of Arizona Diamondbacks on Valley
- m Event attendance at Bank One Ballpark

The information contained in this report is based on 304 in-depth interviews conducted with a representative cross-section of metro Phoenix residents. All of the interviewing on this project was conducted via telephone by professional interviewers of the Behavior Research Center during October 2000. For a detailed explanation of the procedures followed during this project, please refer to the Methodology section of this report.

The Behavior Research Center has presented all of the information germane to the basic research objectives of this project. However, if Elliott D. Pollack & Company management requires additional data retrieval or interpretation, we stand ready to provide such input.

BEHAVIOR RESEARCH CENTER

KEY FINDINGS

Valley residents hold positive attitudes towards Bank One Ballpark and believe it has been a positive addition to the Valley. For example:

- By better than an eight-to-one ratio residents feel the Ballpark has had a positive impact on the Valley – 74 percent positive vs. nine percent negative.
- The most positive benefits that residents feel the Ballpark has brought to the Valley are the economic benefits it provides the area (45%) and the entertainment value it provides (32%).
- Eighty-two percent (82%) of residents believe the Ballpark has had a positive impact on the development of downtown Phoenix.
- Seventy-eight percent (78%) of residents believe the Ballpark has had a positive economic impact on the Valley.
- By better than a five-to-one margin residents indicate their impression of downtown Phoenix has improved since the Ballpark was completed – 54 percent more positive vs. ten percent more negative.

Additionally, by nearly a three-to-one margin, residents believe that the Ballpark was a good investment of public funds – 65 percent good investment vs. 24 percent bad investment.

Several other interesting findings are also evident from this research:

- Eighty-two percent (82%) of residents believe the Arizona Diamondbacks are a benefit to the community.
- Seventy-nine percent (79%) of residents believe that having the Arizona Diamondbacks in town has had a positive impact on the Valley's image in other areas of the US.
- Seventy-nine percent (79%) of residents believe that having the Arizona Diamondbacks play in downtown Phoenix has helped revitalize the downtown area.
- A majority of residents (52%) believe that having the Arizona Diamondbacks in town has improved our quality of life here in the Valley.
- The three events residents would be most interested in attending at the Ballpark other than baseball are sporting events (69%), trade shows (65%) and family shows (64%).

SUMMARY OF THE FINDINGS

IMPACT OF SELECTED FACILITIES ON THE VALLEY

Valley residents were asked to rate seven Valley facilities on their impact on the Valley. As may be seen in Table 1, Bank One Ballpark receives a net positive reading of 65 percent – 74 percent positive minus nine percent negative. This reading falls well below the net positive readings of the Phoenix Zoo (88%) and Desert Botanical Gardens (74%), but is in line with those received by America West Arena (69%), Sun Devil Stadium (66%) and the Phoenix Civic Plaza (66%).

TABLE 1: EVALUATION OF
SELECTED VALLEY FACILITIES

“To begin, do you feel that each of the following local facilities has had a positive, a negative or a neutral impact on the Valley?”

| | Positive | Negative | Neutral | Not Sure | NET POSITIVE ¹ |
|---------------------------------|-----------|----------|-----------|-------------|------------------------------|
| The Phoenix Zoo | 89% | 1% | 6% | 4% | 88% |
| The Desert Botanical Gardens | 74 | 0 | 14 | 12 | 74 |
| America West Arena | 76 | 7 | 11 | 6 | 69 |
| Sun Devil Stadium | 70 | 4 | 16 | 10 | 66 |
| The Phoenix Civic Plaza | 68 | 2 | 19 | 11 | 66 |
| Bank One Ballpark | 74 | 9 | 11 | 6 | 65 |
| Rawhide Western Town | 53 | 2 | 27 | 18 | 51 |

¹Positive minus negative

~~~~~

While Bank One Ballpark's readings do not vary significantly by gender or income, they do vary by residents' age. Thus we find the Ballpark's net positive reading reaching 80 percent among residents under 35 and then declining to 68 percent among 35 to 54 year olds and to 49 percent among residents 55 or over. Also notice that the Ballpark's net positive reading is twice as high among Diamondbacks attendees than non-attendees (80% vs. 41%).

**TABLE 2: DETAIL EVALUATION  
OF BANK ONE BALLPARK**

|                                         | Positive | Negative | Neutral | Not<br>Sure | NET<br>POSITIVE <sup>1</sup> |
|-----------------------------------------|----------|----------|---------|-------------|------------------------------|
| TOTAL                                   | 74%      | 9%       | 11%     | 6%          | 65%                          |
| <u>GENDER</u>                           |          |          |         |             |                              |
| Male                                    | 74       | 10       | 12      | 4           | 64                           |
| Female                                  | 74       | 9        | 9       | 8           | 65                           |
| <u>AGE</u>                              |          |          |         |             |                              |
| Under 35                                | 84       | 4        | 3       | 9           | 80                           |
| 35 to 54                                | 76       | 8        | 12      | 4           | 68                           |
| 55 or over                              | 63       | 14       | 16      | 7           | 49                           |
| <u>INCOME</u>                           |          |          |         |             |                              |
| Under \$40,000                          | 74       | 6        | 11      | 9           | 68                           |
| \$40,000 to \$69,999                    | 79       | 11       | 7       | 3           | 68                           |
| \$70,000 or over                        | 75       | 7        | 14      | 4           | 68                           |
| <u>ATTENDED DIAMOND-<br/>BACKS GAME</u> |          |          |         |             |                              |
| Yes                                     | 84       | 4        | 10      | 2           | 80                           |
| No                                      | 58       | 17       | 12      | 13          | 41                           |

<sup>1</sup>Positive minus negative

~~~~~

BANK ONE BALLPARK'S VALLEY PRESENCE – PROS AND CONS

When residents are asked to indicate what they believe are the positive benefits of having Bank One Ballpark in the Valley, their most common responses are the economic benefits it provides the Valley (45%) and the entertainment value it provides (32%). Residents also mention the benefit of having a professional baseball team in the Valley (18%) and the aesthetics of the facility (11%). Only 16 percent of residents feel there are no benefits.

Also notice in Table 3 that men place particular emphasis on the economic benefits of the Ballpark while women place particular emphasis on the entertainment values.

**TABLE 3: POSITIVE BENEFITS OF
BANK ONE BALLPARK**

“Now I'd like to talk to you about Bank One Ballpark in downtown Phoenix, the home of the Arizona Diamondbacks baseball team. What positive benefits, if any, do you feel there are about having Bank One Ballpark in the Valley?”

| | <u>TOTAL</u> | <u>MALE</u> | <u>FEMALE</u> |
|-----------------------------------------------------------------------------|--------------|-------------|---------------|
| Economic - raises revenue for city, jobs, tourism | 45% | 53% | 36% |
| Entertainment - provides things to do, family activities | 32 | 27 | 37 |
| Diamondbacks - allowed pro team to come to Valley, love baseball, home team | 18 | 14 | 22 |
| Facility - large, looks good, nice ballpark, comfortable | 11 | 11 | 10 |
| Convenient location | 3 | 4 | 3 |
| City's image - prestige, makes Phoenix top notch city, promotes image | 3 | 3 | 2 |
| Brings community together | 1 | 1 | 1 |
| Nothing | 16 | 16 | 17 |
| Not sure | 7 | 4 | 9 |

*Totals exceed 100% due to multiple responses

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On the flip side of the coin, when residents are asked to indicate any drawbacks to having Bank One Ballpark in the Valley, comments focus in three main areas: 1) traffic congestion and parking problems (29%); 2) the method by which the Ballpark was funded (15%), and; 3) the high prices to attend Diamondbacks games (10%). Also notice that over one-third of residents indicate there are no drawbacks (35%).

**TABLE 4: DRAWBACKS OF  
BANK ONE BALLPARK**

“On the flip side of the coin, what drawbacks, if any, do you feel there are about having Bank One Ballpark in the Valley?”

|                                               | <u>TOTAL</u> | <u>MALE</u> | <u>FEMALE</u> |
|-----------------------------------------------|--------------|-------------|---------------|
| Traffic/parking - congestion, lack of parking | 29%          | 28%         | 30%           |
| Funding - used tax payers dollars, no vote    | 15           | 17          | 14            |
| High prices - average family can't attend     | 10           | 8           | 13            |
| Location - inconvenient, not safe             | 6            | 8           | 3             |
| Game atmosphere - crowded, drunks, fights     | 3            | 1           | 6             |
| Lousy team - not winners, overpaid players    | 3            | 4           | 1             |
| Miscellaneous                                 | 5            | 3           | 7             |
| None                                          | 35           | 41          | 28            |
| Not sure                                      | 7            | 4           | 9             |

Totals exceed 100% due to rounding

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CHANGES IN IMPRESSION OF DOWNTOWN PHOENIX SINCE BALLPARK COMPLETED

Fifty-four percent of residents indicate they have a more positive impression of downtown Phoenix today than they did before the ballpark opened in 1998. In contrast, only ten percent of residents have a more negative impression of the area, while 36 percent indicate their impression has remained the same. These figures represent a net positive shift of 44 percent. Residents between the ages of 35 and 54 (+55), those earning \$70,000 or more (+66) and attendees of at least one Diamondbacks game (+55) are more likely than other subgroups to have had their opinions about the downtown area change for the better.

**TABLE 5: CHANGES IN IMPRESSION OF
DOWNTOWN PHOENIX**

“Has your impression of the downtown Phoenix area become more positive, remained about the same or become more negative since Bank One Ballpark was completed in 1998?”

| | More Positive | Remained Same | More Negative | NET POSITIVE ¹ |
|-----------------------------------------|------------------|------------------|------------------|------------------------------|
| TOTAL | 54% | 36% | 10% | + 44% |
| <u>GENDER</u> | | | | |
| Male | 57 | 34 | 9 | + 48 |
| Female | 52 | 38 | 10 | + 42 |
| <u>AGE</u> | | | | |
| Under 35 | 48 | 44 | 8 | + 40 |
| 35 to 54 | 62 | 31 | 7 | + 55 |
| 55 or over | 53 | 35 | 12 | + 41 |
| <u>INCOME</u> | | | | |
| Under \$40,000 | 56 | 37 | 7 | + 49 |
| \$40,000 to \$69,999 | 53 | 37 | 10 | + 43 |
| \$70,000 or over | 70 | 26 | 4 | + 66 |
| <u>ATTENDED DIAMOND- BACKS GAME</u> | | | | |
| Yes | 62 | 31 | 7 | + 55 |
| No | 42 | 44 | 14 | + 28 |

¹More positive minus more negative

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## BALLPARK AS A PUBLIC INVESTMENT

Nearly two-thirds of residents (65%) believe that Bank One Ballpark has been a good investment of public funds while 24 percent consider it a bad investment and 11 percent are not sure. Residents earning \$70,000 or more (75%), younger residents (76%) and those who have attended Diamondbacks games (72%) are the most likely residents to believe the Ballpark was a good public investment.

**TABLE 6: BANK ONE BALLPARK AS A PUBLIC INVESTMENT**

“Now that Bank One Ballpark has been open for several years, do you think it was a good investment of public funds or a bad investment of public funds?”

|                                         | Good | Bad | Not<br>Sure |
|-----------------------------------------|------|-----|-------------|
| TOTAL                                   | 65%  | 24% | 11%         |
| <u>GENDER</u>                           |      |     |             |
| Male                                    | 62   | 23  | 15          |
| Female                                  | 67   | 25  | 8           |
| <u>AGE</u>                              |      |     |             |
| Under 35                                | 76   | 15  | 9           |
| 35 to 54                                | 64   | 22  | 14          |
| 55 or over                              | 55   | 35  | 10          |
| <u>INCOME</u>                           |      |     |             |
| Under \$40,000                          | 63   | 20  | 17          |
| \$40,000 to \$69,999                    | 63   | 27  | 10          |
| \$70,000 or over                        | 75   | 19  | 6           |
| <u>ATTENDED DIAMOND-<br/>BACKS GAME</u> |      |     |             |
| Yes                                     | 72   | 19  | 9           |
| No                                      | 54   | 32  | 14          |

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DIAMONDBACKS AS BENEFIT TO THE COMMUNITY

The vast majority of residents (82%) believe the Arizona Diamondbacks are a benefit to the community, while only 11 percent believe it is not. Younger residents (88%) and Diamondbacks game attendees (89%) are the most likely to view the Diamondbacks as a benefit.

**TABLE 7: DIAMONDBACKS AS
BENEFIT TO COMMUNITY**

“Next, overall do you feel having the Arizona Diamondbacks in the Valley is a benefit or not a benefit to our community?”

| | <u>Benefit</u> | <u>Not Benefit</u> | <u>Not Sure</u> |
|-----------------------------------------|----------------|------------------------|---------------------|
| TOTAL | 82% | 11% | 7% |
| <u>GENDER</u> | | | |
| Male | 82 | 12 | 6 |
| Female | 83 | 9 | 8 |
| <u>AGE</u> | | | |
| Under 35 | 88 | 7 | 5 |
| 35 to 54 | 85 | 8 | 7 |
| 55 or over | 74 | 18 | 8 |
| <u>INCOME</u> | | | |
| Under \$40,000 | 83 | 7 | 10 |
| \$40,000 to \$69,999 | 84 | 11 | 5 |
| \$70,000 or over | 84 | 16 | 0 |
| <u>ATTENDED DIAMOND- BACKS GAME</u> | | | |
| Yes | 89 | 8 | 3 |
| No | 73 | 15 | 12 |

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The main reasons residents feel the Diamondbacks are a benefit to the Valley are: 1) for the entertainment value they provide (59%), and; 2) for their perceived positive economic impact on the Valley (36%).

The main reasons residents give for not feeling the Diamondbacks are a benefit are: 1) the funding mechanism used to build the Ballpark (28%); 2) a belief the Diamondbacks are a lousy team (23%), and; 3) a general dislike for sports (21%).

TABLE 8: REASONS BELIEVE  
DIAMONDBACKS BENEFIT/NOT A BENEFIT

“Why do you feel that way?”

|                                                                                                           | <u>BENEFIT</u>           |
|-----------------------------------------------------------------------------------------------------------|--------------------------|
| Entertainment – provides things to do,<br>family activities, love baseball, another pro<br>team to follow | 59%                      |
| Economic – raises revenue for city, jobs,<br>tourism                                                      | 36                       |
| City's image - prestige, makes Phoenix<br>top notch city, promotes image                                  | 12                       |
| Bring community together                                                                                  | 8                        |
| Role models - players good models                                                                         | 2                        |
| (BASE)                                                                                                    | (251)                    |
|                                                                                                           | <u>NOT A<br/>BENEFIT</u> |
| Funding - used tax dollars, no vote                                                                       | 28%                      |
| Lousy team - not winners, overpaid players/<br>coaches                                                    | 23                       |
| I don't like sports/too much focus on sports                                                              | 21                       |
| High prices - average family can't attend                                                                 | 13                       |
| Poor location - not safe                                                                                  | 5                        |
| Traffic/parking - congestion                                                                              | 4                        |
| Facility too large                                                                                        | 3                        |
| Not sure                                                                                                  | 3                        |
| (BASE)                                                                                                    | (33)                     |

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ATTITUDES ABOUT BANK ONE BALLPARK/DIAMONDBACKS

Residents were asked if they agree or disagree with five statements about Bank One Ballpark and the Arizona Diamondbacks. As may be seen in the following table, approximately eight out of ten residents are in agreement with the following concepts regarding the positive values of the Ballpark and team to the Valley: 1) Bank One Ballpark has had a positive impact on the redevelopment of downtown Phoenix (82%); 2) Having the Arizona Diamondbacks in town has had a positive impact on the Valley's image in other areas of the US; 3) Having the Arizona Diamondbacks play in downtown Phoenix has helped revitalize the downtown area (79%), and; 4) Bank One Ballpark has had a positive economic impact on the Valley (78%).

On the final statement tested, a majority of residents agree with the concept (52%) while 40 percent disagree – having the Arizona Diamondbacks in town has improved our quality of life here in the Valley.

TABLE 9: SELECT ATTITUDES ABOUT
BANK ONE BALLPARK/DIAMONDBACKS

"Next I'd like to read you a variety of comments Valley residents have made about Bank One Ballpark and the Arizona Diamondbacks. As I do, please just tell me if you agree or disagree with each one."

| | Agree | Disagree | Not Sure |
|------------------------------------------------------------------------------------------------------------------|-------|----------|-------------|
| Bank One Ballpark has had a positive impact on the redevelopment of downtown Phoenix | 82% | 12% | 6% |
| Having the Arizona Diamondbacks in town has had a positive impact on the Valley's image in other areas of the US | 79 | 14 | 7 |
| Having the Arizona Diamondbacks play in downtown Phoenix has helped revitalize the downtown area | 79 | 16 | 54 |
| Bank One Ballpark has had a positive economic impact on the Valley | 78 | 15 | 7 |
| Having the Arizona Diamondbacks in town has improved our quality of life here in the Valley | 52 | 40 | 8 |

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### DIAMONDBACKS GAME ATTENDANCE

Four out of ten residents indicate they have never attended a Diamondbacks game at Bank One Ballpark, while 60 percent have. Among those who have ever attended a game, 17 percent did not go to a game during the 2000 season while the average number of games attended in the 2000 season was 5.9.

Females, older residents and lower income residents are those subgroups that are most likely to never have attended a Diamondbacks game at Bank One Ballpark. Among those residents who have attended a game, 2000 season attendance was, on average, higher among males and older residents.

**TABLE 10: DIAMONDBACKS  
GAME ATTENDANCE**

"Have you ever attended an Arizona Diamondbacks baseball game at Bank One Ballpark?" (IF YES): "How many Arizona Diamondbacks games, if any, did you attend at Bank One Ballpark this season?"

|                      | NEVER<br>ATTENDED | 2000 ATTENDANCE |           |           |           |               |                 | MEAN<br>GAMES<br>2000 <sup>1</sup> |
|----------------------|-------------------|-----------------|-----------|-----------|-----------|---------------|-----------------|------------------------------------|
|                      |                   | None            | 1 To<br>2 | 3 To<br>4 | 5 To<br>9 | 10 OR<br>MORE | DON'T<br>RECALL |                                    |
| TOTAL                | 40%               | 17%             | 30%       | 22%       | 17%       | 12%           | 2%              | 5.9                                |
| <u>GENDER</u>        |                   |                 |           |           |           |               |                 |                                    |
| Male                 | 32                | 12              | 23        | 24        | 20        | 19            | 2               | 7.4                                |
| Female               | 47                | 22              | 41        | 19        | 12        | 3             | 3               | 3.7                                |
| <u>AGE</u>           |                   |                 |           |           |           |               |                 |                                    |
| Under 35             | 30                | 20              | 28        | 24        | 17        | 9             | 2               | 6.2                                |
| 35 to 54             | 37                | 11              | 30        | 23        | 17        | 15            | 4               | 4.9                                |
| 55 or over           | 54                | 23              | 32        | 17        | 14        | 14            | 0               | 8.0                                |
| <u>INCOME</u>        |                   |                 |           |           |           |               |                 |                                    |
| Under \$40,000       | 47                | 15              | 37        | 21        | 15        | 9             | 3               | 5.1                                |
| \$40,000 to \$69,999 | 36                | 21              | 30        | 24        | 14        | 8             | 3               | 5.9                                |
| \$70,000 or over     | 24                | 3               | 27        | 25        | 18        | 25            | 2               | 6.1                                |

<sup>1</sup>Among those attending

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OTHER BANK ONE BALLPARK EVENTS ATTENDED

Nearly nine in ten residents (87%) have never attended an event at Bank One Ballpark except for a Diamondbacks game with 84 percent of males and 90 percent of females not having attended.

Religious events, motocross races and concerts have each been attended by three percent of the population while two percent have seen boat shows and one percent have been present at a band pageant.

**TABLE 11: VISITS TO BANK ONE BALLPARK
FOR OTHER EVENTS**

"Have you ever attended any events other than a Diamondbacks game at Bank One Ballpark?" (IF YES): "Which ones?"

| | <u>TOTAL</u> | <u>MALE</u> | <u>FEMALE</u> |
|-----------------|--------------|-------------|---------------|
| None | 87% | 84% | 90% |
| Religious event | 3 | 5 | 1 |
| Motocross race | 3 | 3 | 3 |
| Concert | 3 | 3 | 2 |
| Boat show | 2 | 2 | 1 |
| Band pageant | 1 | 0 | 1 |
| Charity walk | * | 0 | 1 |
| Open house | * | * | 0 |
| Convention | * | 0 | 1 |
| New Times 10K | * | 1 | 0 |
| Don't recall | 2 | 3 | 1 |

Totals exceed 100% due to rounding

*Indicates % less than .5

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The three events residents would be most interested in attending at Bank One Ballpark other than baseball are sporting events (69%), trade shows (65%) and family shows (64%).

**TABLE 12: INTEREST IN SELECTED  
BANK ONE BALLPARK EVENTS**

“How much interest would you have in attending each of the following types of events at Bank One Ballpark – a lot, some or none?”

|                                                                           | A Lot | Some | None | TOTAL<br>INTEREST <sup>1</sup> |
|---------------------------------------------------------------------------|-------|------|------|--------------------------------|
| Sporting event other than<br>baseball such as bas-<br>ketball or football | 31%   | 38%  | 31%  | 69%                            |
| Trade shows such as<br>home and garden,<br>boat, car or RV shows          | 23    | 42   | 35   | 65                             |
| Family shows such as<br>Fiesta Phoenix                                    | 24    | 40   | 36   | 64                             |
| Rock concert                                                              | 19    | 29   | 52   | 48                             |
| Country concert                                                           | 15    | 33   | 52   | 48                             |
| Religious event                                                           | 15    | 26   | 59   | 41                             |
| Business meeting or<br>conference                                         | 8     | 29   | 63   | 37                             |
| Monster trucks                                                            | 12    | 21   | 67   | 33                             |
| Motocross race                                                            | 10    | 23   | 67   | 33                             |

<sup>1</sup>A lot plus some

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METHODOLOGY

The information contained in this report is based on 304 in-depth telephone interviews conducted with metro Phoenix residents 18 years of age or over. Respondent selection of this project was accomplished via a computer-generated, random digit dial telephone sample which selects households based on residential telephone prefixes and includes all unlisted and newly listed households. This methodology was selected because it ensures a randomly selected sample of households proportionately allocated throughout the sample universe.

All of the interviewing on this project was conducted between October 25 and October 29, 2000 at the Center's central location computer-assisted telephone interviewing (CATI) facility where each interviewer worked under the direct supervision of BRC supervisory personnel. All of the interviewers who worked on this project were professional interviewers of the Center. Each had prior experience with BRC and received a thorough briefing on the particulars of this study. During the briefing, the interviewers were trained on: (a) the purpose of the study; (b) sampling procedures; (c) administration of the questions; and (d) other project-related factors. In addition, each interviewer completed a set of practice interviews to ensure that all procedures were understood and followed.

Interviewing on this study was conducted during an approximately equal cross-section of evening and weekend hours. This procedure was followed to ensure that all households were equally represented, regardless of work schedules. Further, during the interviewing segment of this study, up to eight separate attempts, on different days and during different times of day, were made to contact each selected resident. Only after eight unsuccessful attempts was a selected household substituted in the sample. Using this methodology, the full sample was completed, and partially completed interviews were not accepted nor counted toward fulfillment of the total sample quotas.

One hundred percent of the completed interviews were edited, and any containing errors of administration were pulled, the respondent re-called, and the errors corrected. In addition, 15 percent of each interviewer's work was randomly selected for validation to ensure its authenticity and correctness. No problems were encountered during this phase of interviewing quality control.

As the data collection segment of this study was being undertaken, completed interviews were turned over to BRC's in-house coding department. The coding department edited, validated and coded the interviews. Upon completion of coding, a series of validity and logic checks were run on the data to insure it was "clean" and representative of the sample universe. Following this procedure, the detailed computer tables for this project were generated.

When analyzing the results of this survey, it should be kept in mind that all surveys are subject to sampling error. Sampling error, stated simply, is the difference between the results obtained from a sample and those which would be obtained by surveying the entire population under consideration. The size of sampling error varies, to some extent, with the number of interviews completed and with the division of opinion on a particular question.

An estimate of the sampling error range for this study is provided in the following table. The sampling error presented in the table has been calculated at the confidence level most frequently used by social scientists, the 95 percent level. The sampling error figures shown in the table are

average figures that represent the maximum error for the sample bases shown (i.e., for the survey findings where the division of opinion is approximately 50%/50%). Survey findings that show a one-sided distribution of opinion, such as 70%/30% or 90%/10%, are usually subject to slightly lower sampling tolerances than those shown in the table.

As may be seen in the table, the overall sampling error for this study is approximately +/- 5.8 percent when the sample is studied in total (i.e., all 304 cases). However, when subsets of the total sample are studied, the amount of sampling error increases based on the sample size within the subset.

| Sample Size | Approximate Sampling Error At A 95% Confidence Level (Plus/Minus Percentage Of Sampling Tolerance) |
|----------------|-------------------------------------------------------------------------------------------------------------|
| 600 | 4.1 |
| 500 | 4.5 |
| 400 | 5.0 |
| 300 | 5.8 |
| 200 | 7.1 |
| 100 | 10.1 |